DOCUMENT RESUME

ED 340 865 CE 059 954

TITLE Report of the Technical Committee for Marketing.
INSTITUTION Oregon State Dept. of Education, Salem. Div. of Vocational Education.
PUB DATE 88
NOTE 119p.
PUB TYPE Reports - Descriptive (141)

EDRS PRICE MF01/PC05 Plus Postage.
DESCRIPTORS Behavioral Objectives; Competency Based Education; *Distributive Education; Human Relations; Interpersonal Relationship; Job Performance; *Job Skills; *Marketing; Merchandising; Postsecondary Education; Salesmanship; Secondary Education; Task Analysis

ABSTRACT

This committee report identifies the skills and knowledge required by employees in the marketing occupational area. It also provides performance objectives from which competencies and instructional objectives may be developed. Introductory materials include a list of committee members, statement of the marketing committee, information on marketing as a profession, background for the report, a list of the fundamental employment skills and attributes for marketing occupations, and task inventory with rankings. The tasks are grouped into 13 duties: cash register/terminal operations; selling merchandise; performing clerical duties; displaying merchandise; performing receiving functions; performing stockkeeping functions; performing merchandising/maintenance activities; communicating information; performing sales promotion activities; applying human relations skills; managing store functions/physical plant; managing store functions/operations; and managing store functions/people. Each duty is divided into 2 to 16 tasks. Each task is presented on a separate page that provides a performance objective (which identifies the industry standard), performance guide (which lists the steps required to accomplish the task to meet the industry standard), and a list of tools and equipment. A complete equipment list is appended. (YLB)

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REPORT OF THE

TECHNICAL COMMITTEE

FOR

MARKETING

1988

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INTRODUCTION

The Carl D. Perkins Vocational Education Act (PL 98-524) requires that each state establish at least two technical committees per year. The purpose of these technical committees is to identify the skills and knowledges required for occupations for which training is provided for in the state.

The technical committees are composed of members from business, industry, professional associations, and labor, as well as persons with special expertise. In addition, there is one ex officio representative from each of the following areas:

- State Advisory Council for Career and Vocational Education
- Secondary vocational programs
- Community college vocational programs
- Teacher education/higher education

The committees identify the skills and knowledges required in the occupation at three levels.

1. Entry--The skills necessary to obtain the job.

2. Retention--The skills necessary to retain the job beyond the probationary period.

3. Advanced--The skills necessary to advance in the occupation; i.e., journeyperson level.

This work will be used to determine the competencies required in each vocational program and to improve the existing curriculum statewide.

This report reflects many hours and a strong commitment to educational excellence on the part of the committee members. The Department appreciates the work of the committee.

For more information contact Claudia Jensen, Specialist, Business Office, and Marketing Education at 378-3590.

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HOW TO USE THE REPORT OF THE TECHNICAL COMMITTEE

The Technical Committee has identified the skills and knowledges required by employees in a certain occupational area. They have also identified the industry standard (in the performance objective) and the steps that are required to accomplish the task to meet the industry standard (performance guide). Many times there are several ways to competently perform a task, the one given is a suggestion.

The report does not differentiate between skills that can be taught at the secondary or postsecondary level. It is a picture of the occupation and the skills an employee must be able to perform. Thus this document is not a curriculum guide. It is the first step of developing your curriculum or program. Each local advisory committee should review the tasks to determine if they meet local needs. Many times there will be additional tasks that the local committee will identify as being necessary.

Each skill in this report is ranked as being Entry (needed to get the job), retention (needed to keep the job), or advanced (needed to advance in the job or be considered fully responsible in the job).

Once a local committee has reviewed the tasks and the performance objectives, the teacher needs to identify which of these skills are appropriate for each level of instruction. (The statewide education committee will also be doing this and their recommendations can be used as a guide.)

Once the skills have been identified for which instruction will be provided, resources need to be identified and evaluated. Again the statewide education committee will be doing this and recommending 3-4 excellent resources. The teacher/instructor will need to review the material also to determine if additional skills as recommended by their local committee are adequately covered.

Again, this document is not a curriculum; it provides the necessary skills for employment as identified by industry. It also provides performance objectives from which competencies and instructional objectives may be written.

For more information and technical assistance, contact the Department of Education, Division of Vocational Education, 378-3584.

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STATEMENT OF THE MARKETING COMMITTEE

The Marketing Technical Committee used data and materials for other states and from the Vocational Technical Education Consortium of States (V-TECS) work as a starting point. We then chose 13 major duties with a carefully defined task inventory for each duty. Each task was then matched with each job category, using the following coding:

E = Requirement to get the job (entry)

R = Must do to keep the job (retention)

A = Required for advancement

N/A = Not applicable or not a specific function for that job

M = The specific task is not required as an entry skill but will probably be needed as a part of the job sometime in the future. In many cases these are presumed skills.

The terms used in this document generally reflect those commonly used in marketing today.

Some of our committee members felt strongly that even more job categories should be added to our matrix. The basic idea being that marketing in the 1990's and beyond should include virtually all employees in every business . . . not just those who come in contact with customers on a regular basis. Every job function somehow relates to the customer and their needs. However, in the final analysis, we chose to limit our matrix to the more traditional job categories but felt the users of this document should have some exposure to our philosophy that it is everyone's job to market what their employer sells.

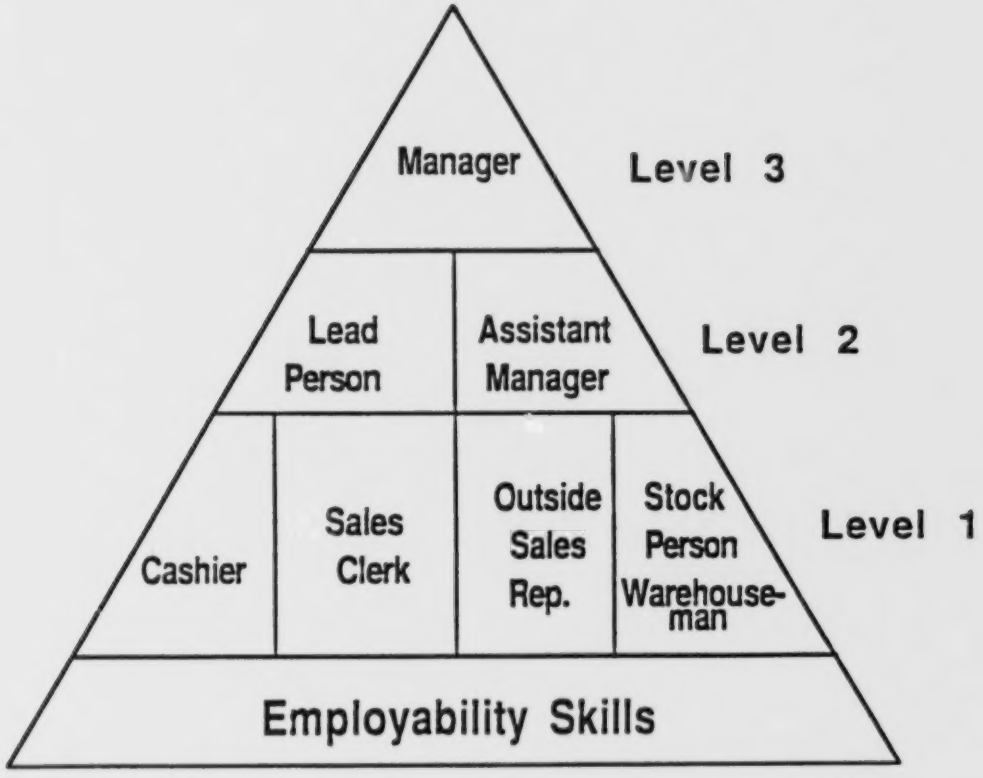
Marketing job categories within these businesses were arranged into three experience levels:

Level 1 = Entry

Levels 2 and 3 = Retention and advanced levels for promotion opportunities

See chart on next page for a graphic display of the occupational titles considered by the Marketing Committee.

Occupational Titles/Marketing



MARKETING AS A PROFESSION

There is a difference between marketing and retailing. All retailing is a form of marketing, but not all marketing is a form of retailing! Selling the public consumer is only one very small part of the total marketing scene. In fact, business-to-business marketing is the fastest growing part of marketing. Marketing should relate to those activities where someone (person or business) is offered ideas, services, and/or products to those who buy for:

- In-house use or self-use
- Resale or giving (Those who pass it on to a third party in some manner)
- Conversion and then for either of the above

Students need to transfer the skills they are learning in their courses to reflect the opportunities in marketing or skills students learn in their classes are transferable in any marketing situation.

Marketing can, and is applied from:

- Maker/creator to the end-consumer
- Maker/creator through an agent to the end-consumer
- Maker/creator through agencies to the end-consumer
- Maker/creator through agencies and their agents to the end-consumer.

The end-consumer may be an individual or a business or organization, just as the maker/creator may be an individual or a business organization. The agent, agencies and their agents may be any person(s) or firm(s) that handle the flow of the idea, service, or product between the maker/creator and the end-consumer. There is marketing at all the levels between the maker/creator and the end-consumer.

Some areas there may be more steps between the maker/creator and the end-consumer, but that becomes a technical point only appropriate to that particular industry, business or product, service or idea.

One of the problems is that marketing should not be a cluster in itself. Marketing is what is done with all the other clusters. All the other clusters should have marketing as part of their curriculum. One thing is to do what one does, but if the output of that work is not marketed successfully to someone else, then the work is useless.

Before someone creates and/or asks someone to perform service or make a product, they had better understand how it is going to be used and marketed by the next two levels, otherwise they may very well be doing something that cannot be used and hence the marketing efforts will be for naught.

Marketing education is meant to include:

- Identifying prospective users and the methods that might be used in reaching them.
- Deciding who the consumers are, at which level(s) of the distribution system they are at, and which method(s) to use to reach them.
- Performing the distribution tasks.
- Performing the business tasks needed to accomplish the above three steps.

Background for the Marketing Technical Committee Report

A group of business and industry people were chosen from the Marketing profession to serve on a Marketing Technical Committee in August 1988. The committee met five times during the fall of 1988 and produced the following documents: Occupational Pyramid; Employability Skills; Task Listing With Rankings; Performance Objectives and Guides; and an Equipment List.

The expertise of the committee and the hard work that was demonstrated during the committee meeting is reflective in the committee report and documents produced.

Occupations Studied/Labor Market Information

Occupations studied for the basis of the task inventory are reported in three experience levels:

Level 1:	Cashier
	Sales Clerk
	Outside Sales Representative
	Stock Person/Warehouseman
Level 2:	Lead Person
	Assistant Manager
Level 3:	Manager

Level 1 includes entry level positions. Levels 2 and 3 include retention and advancement levels for promotion opportunities.

Basic employability skills and job related skills were required for an entry level position.

Labor Market information for the state of Oregon is very promising for the Marketing profession. Employment projections to 1991 are:

Level 1:	Sales Clerks	21,982
	Cashier	19,044
	Sales Representative	50,162
	Stock Clerk/Warehouseman	21,430
Level 2:	Lead Person/Assistant Manager	19,020
Level 3:	Manager	14,754

In analyzing employment opportunities in Marketing for high school and community college graduates, the committee decided the following business categories would be generally acknowledged to be provider of jobs at the retail, wholesale, and manufacturing occupations:

Retail:	Grocery/Variety/Drug stores
	General multi-department merchandise
	Specialty stores
Food:	Fast food/other restaurants
Automobile:	New and used car dealers
Electronics:	Copy/Office products, telephones/pagers (commercial)
Hotel/Motel Services	

Marketing students should be aware of additional marketing job opportunities that are available in industry other than those mentioned above.

In analyzing employment opportunities in Marketing for high school and community college graduates, our committee decided that there are many opportunities for employment in businesses that sold tangible products and provided the services that go with those products: manufactures, wholesalers, and retailers, who's outputs were sold to their customers for in-house/self-use, resale/giving, or conversion and then for in-house/self-use or resale/giving.

1. These firms could offer multi-category (department/general merchandise) products or could be single category (though not singular product) in scope, and they could be from quite small local firms to very large regional firms.

2. There are many specialized fields where many of the skills needed are the same as we have listed here, but were not necessarily in our thinking: fast food/restaurant, new and used cars, consumer electronics, office and communications products.

3. There are also many opportunities in the "service" (nontangible) area, and many of these same skills are needed, but they were not in our thinking: health care, financial, legal, accounting, education, government, the sciences, etc.

FUNDAMENTAL EMPLOYMENT SKILLS AND ATTRIBUTES
FOR MARKETING OCCUPATIONS

- WORK MATURITY/ATTITUDES

1. Dependability/Appropriate Conduct

    a. Attendance
    b. Promptness
    c. Follow through

2. Flexibility/Adaptability

    a. Open-mindedness
    b. Ability to change

3. Motivation

    a. Willing to learn
    b. Initiative

4. Productivity

    a. Organize tasks
    b. Time management
    c. Efficient
    d. Accuracy

        1) ability to file forms
        2) complete forms
        3) produce counts

5. Loyalty

6. Confidence

    a. Job testing techniques
    b. Selling your skills
    c. Forthrightness

7. Sensitivity

    a. Coworkers
    b. Customers/clients/guests
    c. Positive contribution to morale

8. Accepts Constructive Criticism in Evaluation/Professional Growth

9. Accepts Responsibility

10. Takes Pride in Work

11. Honesty

12. Problem Solving

    a. Analyze problem
    b. Identify alternatives
    c. Plan of action

13. Grooming and Appearance

14. Communication

    a. Written
    b. Verbal/nonverbal
    c. Listening

15. Basic Reading Skills

16. Basic Arithmetic Skills

17. Correct Keyboarding Techniques

    a. Alpha/numeric keyboard
    b. Ten key

• JOB ACQUISITION SKILLS

1. Locate Job Market Information

    a. Placement office
    b. Acquaintances/friends
    c. Governmental employment office
    d. Private recruiting firms/agencies
    e. Publications
    f. Prospecting

2. Knowledge of Company/Job

3. Portfolio

    a. Resume
    b. Cover letter for portfolio content
    c. Letters of Recommendation
    d. Competency profile (examples of work, CWE, titles, degrees, awards)

4. Letter of Application/Individualized Cover Letter

5. Appropriate Attire

6. Application

7. Interview

    a. Meaningful questions
    b. Honesty
    c. Good eye contact

d. Personal inventory testing

1) competencies
2) Personality test

e. Follow-up letter/phone call/visit

8. Locate Job Market Information

a. Placement office
b. Acquaintances/friends
c. Governmental employment office
d. Private recruiting firms/agencies
e. Publications
f. Prospecting

• HUMAN RELATIONS SKILLS

1. Understand and Act With Empathy Toward Others

a. Ability to get along with others
b. Ability to compromise

2. Dealing With Conflict and Stress

3. Team Attitude (Importance of Acceptance)

a. Into group
b. With group decisions

4. Participate/Contribute Effectively in Groups

a. Understand group dynamics
b. Adapt personal skills to fit group needs
c. Present ideas
d. Handle success and rejection

TASK INVENTORY

INSTRUCTIONS: Listed are the manipulative and knowledge skills relating to the marketing occupations. To the right of the page are listed the occupational titles used for this validation. Each task was verified as to an entry level skill (E), a retention level skill (R), or an advancement level skill (A). The cashier/sales clerk classification lists duties and task descriptions that may be basic to the other occupation titles.

DUTY NO.	TASK NO.	TASK	Cashier/Sales Clerk	Stock Person/Warehouse	Sales Representatives	Lead Person/Foreman	Assistant Manager	Manager	Performance Objective
A		CASH REGISTER/TERMINAL OPERATIONS							
	1	Ring up the correct price of the merchandise.	R	R	R	E	M	M	1
	2	Make change.	E	F	E	E	M	M	2
	3	Ring up orders of merchandise on the cash register/terminal.	R	NA	R	E	M	M	3
	4	Examine checks.	R	NA	R	E	M	M	4
	5	Process customer returns.	R	R	R	E	M	M	5
	6	Process a charge sale.	R	R	R	E	M	M	6
B		SELLING MERCHANDISE							
	1	Gain Product/Service Knowledge.	R	A	R	R	E	E	7
	2	Fill out a sales slip.	R	R	R	R	R	R	8
	3	Take mail and/or telephone orders.	R	R	R	R	M	M	9
	4	Package customers' orders of merchandise.	R	R	NA	R	M	M	10
	5	Process orders for merchandise not on hand.	R	NA	R	R	M	M	11
	6	Handle customer complaints.	R	R	R	R	E	E	12

E = Required to get the job
R = Must do to keep the job
A = Required for advancement
NA = Not a specific function
M = See sheet

TASK INVENTORY

INSTRUCTIONS: Listed are the manipulative and knowledge skills relating to the marketing occupations. To the right of the page are listed the occupational titles used for this validation. Each task was verified as to an entry level skill (E), a retention level skill (R), or an advancement level skill (A). The cashier/sales clerk classification lists duties and task descriptions that may be basic to the other occupation titles.

DUTY NO.	TASK NO.	TASK	Cashier/Sales Clerk	Stock Person/Warehouse	Sales Representatives	Lead Person/Foreman	Assistant Manager	Manager	Performance Objective
	7	Demonstrate merchandise/describe service.	R	NA	R	R	M	M	13
	8	Create extra sales.	R	NA	R	R	M	M	14
	9	Authorize checks.	R	NA	R	R	R	R	15
	10	Gift wrap customers' purchases.	R	R	R	R	M	M	16
	11	Approve a charge sale.	R	NA	R	R	R	R	17
	12	Process installment and revolving credit sales.	R	R	R	R	M	M	18
	13	Process lay-away sales.	R	R	R	R	M	M	19
	14	Process customer exchanges.	R	R	R	R	M	M	20
	15	Process refunds.	R	R	R	R	M	M	21
	16	Detect and report shoplifting.	R	R	R	R	M	M	22
C		PERFORMING CLERICAL DUTIES							
	1	Close out cash register.	R	NA	R	R	M	M	23
	2	Fill out cash register summary sheet.	R	NA	R	R	M	M	24
	3	Prepare bank deposits.	NA	NA	NA	A	R	R	25
	4	Process shipment memo to correct errors on merchandise received.	R	R	R	R	M	M	26
	5	Record merchandise price changes in price book.	R	R	R	R	M	M	27
D		DISPLAYING MERCHANDISE							
	1	Set up window displays.	NA	NA	R	A	M	M	28
	2	Build displays.	R	NA	R	R	M	M	29
	3	Perform display housekeeping.	R	NA	R	M	NA	M	30

TASK INVENTORY

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DUTY NO.	TASK NO.	TASK	Cashier/Sales Clerk	Stock Person/Warehouse	Sales Representatives	Lead Person/Foreman	Assistant Manager	Manager	Performance Objective
	4	Design point-of-purchase signs.	R	NA	R	R	M	M	31
	5	Dismantle displays.	R	R	R	R	M	M	32
E		PERFORMING RECEIVING FUNCTIONS							
	1	Receive incoming merchandise.	R	R	NA	R	M	M	33
	2	Unpack a shipment.	R	R	R	R	M	M	34
F		PERFORMING STOCKKEEPING FUNCTIONS							
	1	Check in the merchandise.	R	R	R	E	M	M	35
	2	Price/mark each item of merchandise.	R	R	R	R	M	M	36
	3	Stock merchandise.	R	R	R	R	M	M	37
G		PERFORMING MERCHANDISING/MAINTENANCE ACTIVITIES							
	1	Count floor merchandise.	R	E	R	M	M	M	38
	2	Order replacement merchandise.	A	A	NA	R	R	M	40
	3	Change prices on merchandise.	R	R	R	R	M	M	41
H		COMMUNICATING INFORMATION							
	1	Communicate verbally.	F	E	E	E	E	E	42
	2	Communicate by telephone.	E	F	E	E	E	E	43
	3	Introduce people.	R	R	E	R	M	M	44
	4	Complete a business form.	R	R	R	R	R	R	45
	5	Follow oral instructions.	E	F	E	F	E	E	46
	6	Keep informed of promotions, ongoing policies and procedures.	R	R	R	R	R	R	47

TASK INVENTORY

INSTRUCTIONS: Listed are the manipulative and knowledge skills relating to the marketing occupations. To the right of the page are listed the occupational titles used for this validation. Each task was verified as to an entry level skill (E), a retention level skill (R), or an advancement level skill (A). The cashier/sales clerk classification lists duties and task descriptions that may be basic to the other occupation titles.

DUTY NO.	TASK NO.	TASK	Cashier/Sales Clerk	Stock Person/Warehouse	Sales Representatives	Lead Person/Foreman	Assistant Manager	Manager	Performance Objective
	7	Identify and keep information confidential.	R	R	R	E	E	E	48
	8	Use communication skill to bring about improvement in the work situation.	A	A	R	R	R	E	49
	9	Distribute organization information through established channels.	NA	NA	R	R	R	M	50
I		PERFORMING SALES PROMOTION ACTIVITIES							
	1	Plan promotional program.	NA	NA	R	R	E	E	51
	2	Develop advertising/public relations plan.	NA	NA	R	R	E	E	[illegible]
	3	Plan displays and display time schedules.	R	NA	R	R	E	E	53
	4	Carry out promotional program.	R	NA	R	R	E	E	54
J		APPLYING HUMAN RELATIONS SKILLS							
	1	Assure cooperation between coworkers.	E	E	E	E	E	E	55
	2	Assist customers.	R	R	M	R	R	R	56
	3	Participate in professional development activities.	R	R	R	A	A	E	57
K		MANAGING STORE FUNCTIONS/PHYSICAL PLANT							
	1	Plan physical store layout.	NA	NA	NA	NA	R	E	58
	2	Plan product/space allocation.	NA	NA	R	R	R	E	59
	3	Conduct an exterior housekeeping program.	R	R	NA	R	M	M	60
	4	Conduct an interior housekeeping program.	R	R	NA	R	M	M	61
	5	Arrange for building repairs.	R	R	NA	R	R	R	[illegible]

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TASK INVENTORY

INSTRUCTIONS: Listed are the manipulative and knowledge skills relating to the marketing occupations. To the right of the page are listed the occupational titles used for this validation. Each task was verified as to an entry level skill (E), a retention level skill (R), or an advancement level skill (A). The cashier/sales clerk classification lists duties and task descriptions that may be basic to the other occupation titles.

DUTY NO.	TASK NO.	TASK	Cashier/Sales Clerk	Stock Person/Warehouse	Sales Representatives	Lead Person/Foreman	Assistant Manager	Manager	Performance Objective
L		MANAGING STORE FUNCTIONS/OPERATIONS							
	1	Monitor and control store income and expenses.	NA	NA	NA	A	R	E	63
	2	Operate inventory control program.	NA	A	NA	A	R	E	64
	3.	Take inventory.	R	R	R	R	R	E	65
	4.	Observe safety precautions.	R	R	R	E	E	E	66
	5.	Handle shoplifting incidents.	NA	NA	NA	A	R	R	67
	6.	Make comparison shopping trips.	R	R	R	R	M	M	68
	7.	Ensure established store policies and procedures are used correctly.	R	R	R	E	E	E	69
	8.	Audit cash register/petty cash and prove cash drawer.	R	NA	NA	E	E	E	70
M		MANAGING STORE FUNCTIONS/PEOPLE							
	1	Maintain a positive working environment.	NA	NA	NA	R	E	E	71
	2	Identify and delegate tasks to employees.	NA	NA	NA	R	R	E	72
	3	Recognizes and follows lines of authority.	NA	NA	R	R	E	E	73
	4	Orient new employees.	NA	NA	NA	R	R	E	74
	5	Train new employee.	NA	NA	NA	R	E	E	75
	6	Evaluate employee's work.	NA	NA	NA	R	E	E	76
	7	Handle employee accidents and emergency illnesses.	NA	NA	NA	R	R	R	77
	8	Conduct meetings for store personnel.	NA	NA	NA	R	R	E	78

DUTY A: PERFORMING CASH REGISTER/TERMINAL OPERATIONS

TASK 1: Ring up the correct price of the merchandise.

---

1. PERFORMANCE OBJECTIVE

Given an item, ring up correct price of merchandise using appropriate calculations for multiple-price items, cents-off, or percentage-off sticker price items.

PERFORMANCE GUIDE

1. Read the price marked on the merchandise.
2. If the item is price-marked with a multiple price and there is only one or two of the items, divide the grouped price by the number of marked units and the result will be the cost of a single unit.
3. Multiply the single unit price times the number being purchased.
4. If the item is sticker priced with a multi-price:
   a. There is one or two divided, the grouped price by the number of units to determine individual price.
   b. Multiply that by the number being purchased.
5. If the item is cents-off the sticker price: Subtract the cents off the sticker price to determine the price to ring up.
6. If the item is percentage-off the sticker price, then either:
   a. Multiply the sticker price by the percentage-off to arrive at an amount that is then subtracted from the sticker price to arrive at the price that will be rung up, or
   b. From 100 percent, subtract the percentage-off to arrive at a percentage rate that is then multiplied by the sticker price to arrive at the price that will be rung up.
7. If given Canadian currency, convert to American value using approved rate of exchange.

TOOLS AND EQUIPMENT

Calculator
Paper
Pencil/pen
Canadian exchange chart

DUTY A: PERFORMING CASH REGISTER/TERMINAL OPERATIONS

TASK 2: Make change.

---

2. PERFORMANCE OBJECTIVE

Given a total cost for an order of merchandise and the amount of money submitted by customer, make change to the customer.

PERFORMANCE GUIDE

1. For change-calculating cash registers:

   a. State the total cost of the order of merchandise.
   b. State the amount that the customer remits.
   c. Place the customer's money on the cash register change plate.
   d. Orally count back to the customer the amount of change due, beginning with the largest denominations (bills) and closing with coins.
   e. Place customer's money into cash drawer after they have acknowledged receiving the correct change.

2. For nonchange-calculating cash registers:

   a. State the total amount of purchase.
   b. State the amount of customer's remittance.
   c. Place customer's remittance on cash register change plate.
   d. Silently count starting at the total cost of the purchase and add up to the amount remitted, as you are obtaining cash from the cash drawer.
   e. Use the largest denomination of coins and bills available for change.
   f. Count aloud starting at the total cost of the purchase as you are returning change to customer, starting with lowest coinage through the largest bill.
   g. Place customer's remittance into cash drawer only after customer has acknowledged receiving correct amount of change.

3. Convert Canadian exchange to American value using approved rate.

TOOLS AND EQUIPMENT

Cash register (change calculating)
Cash register (nonchange calculating)
Canadian exchange chart

DUTY A: PERFORMING CASH REGISTER/TERMINAL OPERATIONS

TASK 3: Ring up orders of merchandise on the cash register/terminal.

---

3. PERFORMANCE OBJECTIVE

Given merchandise, ring up orders of merchandise on cash register/terminal to complete the sale, using correct cash register operation techniques.

PERFORMANCE GUIDE

1. Arrange merchandise on counter, put like items with like items.
   a. Arrange merchandise in a logical order, such as:
      - large to small items
      - taxable and nontaxable
      - hard and soft (perishable/fragile) items
   b. Make sure that you can see all the items.
2. Ask customer if they have any coupons for any of the items chosen.
3. Enter each item, quantity, price on the register.
   a. Some registers use a wand or reader to enter item on the register. Every item must be entered separately or multi-packed items if priced separately will have to be entered by hand.
   b. Verify prices on unmarked or illegibly marked items with price list or other employee.
4. Move each category of merchandise to another part of the counter as it is entered on the register. Check the physical count as you move it with the count on the register.
5. Check to see that all items have been entered on the register.
6. Total taxable and nontaxable items separately.
   a. Calculate tax or refer to tax chart, enter the tax on the register.
   b. Total nontaxable items.
   c. Subtotal taxable items, tax and nontaxable items.
7. Subtract any credits for coupons/returns and enter the amount on the register.
8. Total the transaction: purchases less credits.
9. Tell the customer the amount of the merchandise.
10. Follow the procedure for receiving customer's money and making change, receiving and processing customer's check, or using credit card. (See A-1, 3, 4, and 6, and B-9 and 11.)

DUTY A: PERFORMING CASH REGISTER/TERMINAL OPERATIONS

TASK 3: Ring up orders of merchandise on the cash register/terminal.

(Continued)

TOOLS AND EQUIPMENT

Cash register/terminal
Tax chart
Exchange (Canadian currency) chart

DUTY A: PERFORMING CASH REGISTER/TERMINAL OPERATIONS

TASK 4: Examine checks.

---

4. PERFORMANCE OBJECTIVE

Given customer checks, examine each check using check authorization procedures and standards for properly written checks.

PERFORMANCE GUIDE

1. Examine the check for acceptability.

   a. Identify the bank on which the check is drawn.
   b. Determine that the date is acceptable.
   c. Verify that the payee line is correctly filled in.
   d. Verify that the written amount and figure amount are in agreement.
   e. Ask customer for identification and write identifying numbers on check according to store policy.
      - Driver's license
      - Credit cards--card issued by___, number, and expiration date
      - Phone number
   f. Verify that check is correctly signed by customer and matches the signatures on the identification.
   g. Determine that check has no alterations.
   h. Determine that check is imprinted with customer's name and address.
   i. If check is for exact amount, follow company policies for giving change.

2. Have check authorized according to store policy.

   a. Initial the check.
   b. Determine whether further authorization is needed.

3. Validate check in register or by stamp.

4. Put customer's check in proper place in cash drawer.

TOOLS AND EQUIPMENT

Checks
Check cashing procedures
Customer identification
Check stamp
Cash register

CHECKS

M R Student
121 Main Street
Office, Kentucky 00700

104

Aug. 30 19 75

000-00
50/100

PAY TO THE ORDER OF H. Stone & Son $ 4 00/100

Four and 00/100 DOLLARS

YOUR BANK
ANYTOWN, U.S.A.

STUDENT PRACTICE
NON-NEGOTIABLE

⑆0000-0000⑆ Mike R. Student

M R Student
121 Main Street
Office, Kentucky 00700

105

June 6 19 75

000-00
50/100

PAY TO THE ORDER OF Market Plaza $ 14 50/100

Fourteen and 50/100 DOLLARS

YOUR BANK
ANYTOWN, U.S.A.

STUDENT PRACTICE
NON-NEGOTIABLE

⑆0000-0000⑆ M.R. Schrader

M R Student
121 Main Street
Office, Kentucky 00700

106

Feb 31 19 75

000-00
30/100

PAY TO THE ORDER OF Food City Inc. $ 31 30/100

Thirty and 31/100 DOLLARS

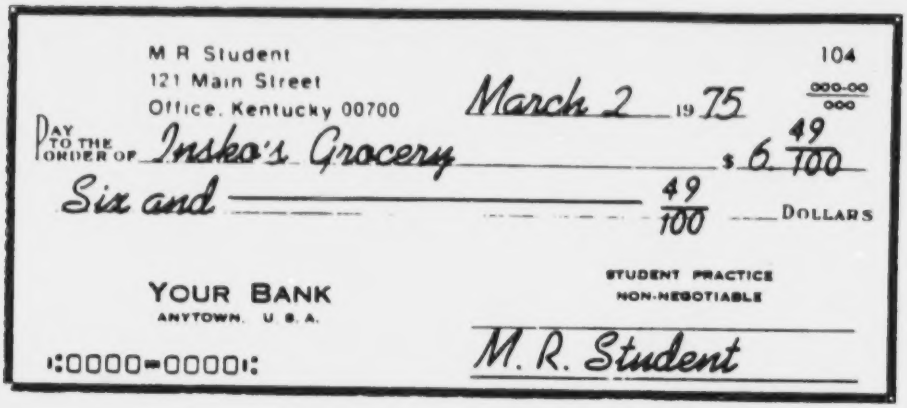
YOUR BANK
ANYTOWN, U.S.A.

STUDENT PRACTICE
NON-NEGOTIABLE

⑆0000-0000⑆ Mr. Student

ASLMORE CBC AT 1397-9 MED

CHECKS



M R Student
121 Main Street
Office, Kentucky 00700

104

March 2 19 75

PAY TO THE ORDER OF Insko's Grocery $ 6 49/100

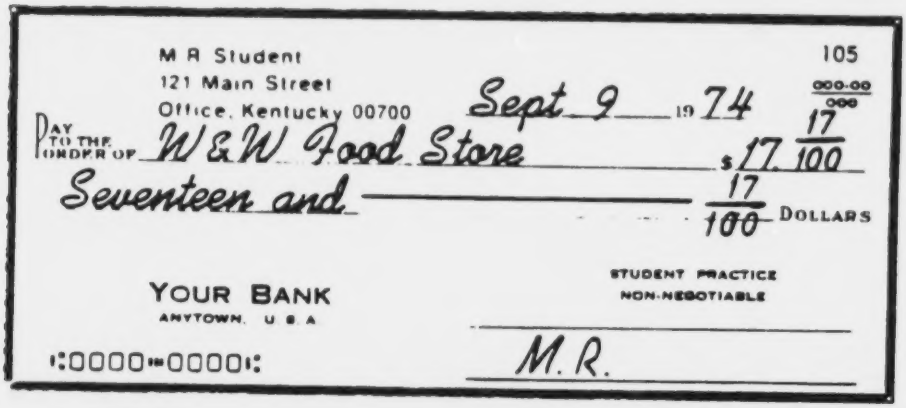
Six and 49/100 DOLLARS

YOUR BANK
ANYTOWN, U.S.A.

STUDENT PRACTICE
NON-NEGOTIABLE

:0000-0000:

M. R. Student



M R Student
121 Main Street
Office, Kentucky 00700

105

Sept 9 19 74

PAY TO THE ORDER OF W & W Food Store $ 17 17/100

Seventeen and 17/100 DOLLARS

YOUR BANK
ANYTOWN, U.S.A.

STUDENT PRACTICE
NON-NEGOTIABLE

:0000-0000:

M. R.

M R Student
121 Main Street
Office, Kentucky 00700

106

April 2 19 75

PAY TO THE ORDER OF Community Food Mark $ 79 62/100

Eighty Nine 62/100 DOLLARS

YOUR BANK
ANYTOWN, U.S.A.

STUDENT PRACTICE
NON-NEGOTIABLE

:0000-0000:

Mike R. Student

GILMORE CWC JR 1999 B M&O

DUTY A: PERFORMING CASH REGISTER/TERMINAL OPERATIONS

TASK 5: Process customer returns.

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5. PERFORMANCE OBJECTIVE

Provided a customer with merchandise to return and using exchange, cash refund, or credit charge procedures process the customers' returns. The exchange must be made according to policy; money, credit, or addition paid by customer must be accounted for; reason for return must be noted on exchange form.

PERFORMANCE GUIDE

1. Find out what the customer is returning and why.
2. Check the customer's original sales slip to determine type of sale.
3. Determine if the customer wants other merchandise in exchange.
4. Inspect returned merchandise.
5. Assist the customer in getting new merchandise.
6. Fill out proper forms for return/exchange.
7. Process paper work according to whether it is an even or uneven exchange.
    a. Even exchange--run through system.
    b. Uneven exchange.
        1) Where new item is more than return, process balance as a sale.
        2) If return is more than new item, write a credit slip and new sales slip.
            a) Apply difference to customer's account, credit card, or give cash as applicable.
            b) Whenever giving cash back, get supervisor's okay.
8. Process paperwork for returns.
    a. Write return slip.
    b. Obtain approval.
    c. Apply refund to customer's account, credit card, or give cash as applicable.

TOOLS AND EQUIPMENT

Sales slip
Return forms
Pen
Telephone
Merchandise
Cash register
Credit card imprinter

DUTY A: PERFORMING CASH REGISTER/TERMINAL OPERATIONS

TASK 6: Process a charge sale.

---

6. PERFORMANCE OBJECTIVE

Provided a customer who desires to make a credit card sales transaction, a merchandise credit card draft and an imprinter, process a charge sale. All required information must be entered on the credit card sales ticket, the ticket must be signed by the customer, and all procedures to validate the sales transaction must be performed. (1/2)

PERFORMANCE GUIDE

1. Ask the customer for credit card.

2. Check the credit card.

   a. If card is unsigned and the customer has positive identification, ask her/him to sign it.
   b. Compare the credit card against the card numbers on the most recent warning notice. If customer's number appears on the list, call the authorization center.
   c. Check the expiration date. If valid, continue processing. If card has expired, inform customer that purchase cannot be charged on the card.

3. Determine the amount of the sale.

4. Process the sales ticket through the imprinter with customer's card:

   a. Check date on the imprinter.
   b. Place credit card face-up in imprinter.
   c. Imprint ticket. Check sales ticket to see that the following information is clearly printed:
      - Card holder's name
      - Expiration date
      - Account information
      - Merchant's name

5. Write the following information in the appropriate spaces:

   a. Write legibly so others can read.
   b. Date of sales transaction.
   c. 1) A description of merchandise if there is no in-house sales slip; 2) Do in-house sales slip cross-reference according to company policy.
   d. Quantity and price of each item.
   e. Extend and check mathematics.
   f. Add sales tax and shipping as applicable.
   g. Total sales slip and check mathematics.
   h. Ask the customer to sign the sales ticket. Check the signature to determine that it matches the signature on the card.

i. Ask for and record the customer's phone number and address.
j. Check all copies of sales ticket to determine that each is legible.

6. Call the authorization center to verify customer's credit, or use computer equipment to get credit code. Enter authorization code on sales draft.

7. Return the customer's credit card with copy of the sales ticket.

8. Put remaining copies of sales draft in the register.

TOOLS AND EQUIPMENT

Credit card imprinter
Customer identification
Credit card warning list
Cash register
Computer--on-line credit approval
Telephone
Credit card draft

DUTY B: SELLING MERCHANDISE

TASK 1: Gain product/service knowledge.

---

7. PERFORMANCE OBJECTIVE

Given product and information concerning the services and products you will be offering to customer's gain product/service knowledge to be effective salesperson.

PERFORMANCE GUIDE

Determine:

1. Who makes/offers it?

   a. Their History
   b. Where do they fit into the marketplace?

2. What is it made/consist of?

3. How is it made/brought together?

4. Its appearance--Why does it appear the way it does to the customer?

5. Why is it different from other services/products that your company or their competitors offer?

6. Application and Use:

   a. When does the customer use or apply it?
   b. How often does the customer use or apply it?

7. Customer Involvement:

   a. How does the customer care for the product?
   b. What do they have to do to make it work?

8. History of Item:

   a. Where are the roots/what is the history of the product?
   b. How long will it last?

9. How many different ways could it be used by the customer?

   Facts: 1) size; 2) color; 3) delivery time, etc.

10. The price $?

11. Different ways item might be purchased: 1) cash; 2) credit card

12. Ways to use credit to increase sales.

DUTY B: SELLING MERCHANDISE

TASK 1: Gain product/service knowledge.

(Continued)

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13. Explain warranties, guarantees, and time, or other limitations.

TOOLS AND EQUIPMENT

Product
Product documentation (warrantees, guarantees)
Service list/documentation

DUTY B: SELLING MERCHANDISE

TASK 2: Fill out a sales slip.

---

8. PERFORMANCE OBJECTIVE

Given charge card imprinter and cash register fill out a sales slip so that the transaction can be completed in order to provide information for the credit office, stock rooms, and additional record keeping.

PERFORMANCE GUIDE

1. Write legibly so other people can read.
2. Get customer's name and address or imprint in-house charge card.
3. Get delivery information.
4. List items, quantity, and price.
5. Extend quantity for each item and check arithmetic.
6. Total sale slip and check mathematics.
7. Add sales tax, shipping, or other charges as applicable.
8. Total and check mathematics.
9. Determine method of payment.
    a. Cash (See A1, 2, and 3.)
        1) Obtain money and determine whether change needed.
        2) Ring up sale, validate sales slip.
        3) Give customer proper change, if appropriate.
    b. Cash sale by check. (See B-9)
    c. In-house charge sale
        1) Get customer signature.
        2) Forward sales slip to cashier for processing or ringing sale through your register.
    d. If bank credit card charge some stores require a separate sales slip plus a credit card slip. (See A-6.)
    e. In-house installment credit sales. (See B-12)
    f. Process layaway sale. (See B-13)

TOOLS AND EQUIPMENT

Sales slip
Charge card imprinter
Pen
Cash register

DUTY B: SELLING MERCHANDISE

TASK 3: Take mail and/or telephone orders.

---

9. PERFORMANCE OBJECTIVE

Given telephone or mail order packaging materials, fill mail and/or telephone orders correctly recording transaction and within timelines set by company policy.

PERFORMANCE GUIDE

Take Order:

1. Write legibly so others can read.
2. Obtain customers name, address, telephone number.
3. Obtain delivery information: to whom, address, city, zip.
4. Obtain information concerning requested merchandise.
   a. Source? Catalog, newspaper, etc.
   b. Reference--page, style, number
   c. Description of item ordered
   d. Color
   e. Size
   f. Style
   g. Price
   h. Quantity requested
   i. Date promised or date needed
5. Determine if merchandise is available.
   a. Reserve or set aside.
   b. If back-ordered, follow store policy. (See B-5.)
6. Complete the transaction.
   a. Determine method of payment.
   b. Get clearance for charge.
   c. Ring up the sale.
7. Send correct paper work to warehouse if appropriate.

TOOLS AND EQUIPMENT

Order forms
Computer terminal
Sales slips
Pen
Cash register
Credit card approval system

18A

CUSTOMER'S REQUEST FOR MERCHANDISE

SPECIAL ORDER [ ] NEW ITEM [ ] OUT-OF-STOCK [ ]

CUSTOMER'S NAME _____

ADDRESS _____

CITY, STATE, ZIP _____

PHONE NUMBER _____

SEND TO:

NAME _____

ADDRESS _____

CITY, STATE _____

GIFT WRAPPED [ ] YES [ ] NO

ENCLOSURE _____

MESSAGE _____

_____

_____

METHOD OF PAYMENT:

CASH [ ] CHARGE [ ]

INHOUSE ACCOUNT NUMBER _____

CHARGE CARD NUMBER _____

EXPIRATION DATE _____

DESCRIPTION OF MERCHANDISE

ITEM _____

BRAND _____

SIZE _____

QUANTITY _____

CUSTOMER'S SIGNATURE _____

APPROXIMATE DATE OF AVAILABILITY _____

DUTY B: SELLING MERCHANDISE

TASK 4: Package customers' orders of merchandise.

---

10. PERFORMANCE OBJECTIVE

Given order for merchandise, sales slip, package materials, customer's orders of merchandise so no damage occurs to purchase meeting delivery service requirements if for delivery and package is properly labeled.

PERFORMANCE GUIDE

1. Check items for packing against sales slip.
2. Select proper bag or box size.
3. Open or set up container carefully without tearing.
4. Place container on a solid surface and proceed with packing.
5. For packing:
    a. Preparation:
        1) Provide special packing materials for perishable, fragile items.
        2) Check lids, bottle caps, and other closures to be sure they are secure.
    b. If a bag is used:
        1) Place heavy items on the bottom.
        2) Place rectangular items along the sides.
        3) Place glass items in a protected space.
        4) Place fragile and crushable items on top.
        5) Place small items between merchandise of different shape.
        6) Distribute heavy and light items evenly among bags.
    c. If a box is used for delivery or mailing:
        1) Seal bottom of the box.
        2) If needed put protective packaging material in the box.
        3) Place heavy items in the bottom.
        4) Add packing materials.
        5) Add lighter items.
        6) Add packing materials to top and sides.
        7) Carefully shake the box to settle packing material, and add more if necessary.
        8) Put packing slip and other printed material in the box.
        9) Close and seal box.
        10) Attach proper labeling on the outside of the box.
        11) Give to customer or send package to delivery area:
            a) To customer pickup area.
            b) To pick up shelf.
            c) To mail or package delivery area.

DUTY B: SELLING MERCHANDISE

TASK 4: Package customers' orders of merchandise.

(Continued)

TOOLS AND EQUIPMENT

Sales slip
Bags
Boxes
Package filling
Sealing tape
Labels

DUTY B: SELLING MERCHANDISE

TASK 5: Process orders for merchandise not in stock.

---

11. PERFORMANCE OBJECTIVE

Given store's forms, process orders for merchandise not in stock.

PERFORMANCE GUIDE

1. Write legibly so others can read.
2. Obtain customer's name, address, telephone number.
3. Obtain delivery information: to whom, address, city, zip.
4. Obtain information concerning requested merchandise.
   a. Source? Catalog, newspaper, etc.
   b. Reference--page, style, number
   c. Description of item ordered
   d. Color
   e. Size
   f. Style
   g. Price
   h. Quantity requested
   i. Date promised or date needed
5. Price and extend all items--total.
6. Get customer signature, if appropriate.
7. Get customer method of payment and/or deposit.
8. Process special order with credit office if appropriate.
9. Get deposit receipt (if applicable) for customer.
10. Give customer copy of special order.
11. Forward order to the appropriate department.
12. Maintain follow-up file to check on the order before tentative delivery date.

(See sample for in Performance Objective 9.)

TOOLS AND EQUIPMENT

Merchandise order forms
Product ordering source
Credit card imprinter
Credit approval system
Pen
Cash register/terminal
Sales slip

DUTY B: SELLING MERCHANDISE

TASK 6: Handle customer complaints.

---

12. PERFORMANCE OBJECTIVE

Given problem encountered by customer, handle customer complaints and resolve to satisfaction of customer and company policy.

PERFORMANCE GUIDE

1. If possible, have customer sit down.

2. Thank customer for letting you know something is wrong and apologize for inconvenience.

3. Proceed as follows:

   a. If possible, sit down next to the customer (no desk/table/or counter between you and customer).
   b. If at counter, stand next to customer, not behind.

4. Get form or pad to write customer complaint.

   a. Name, address, telephone.
   b. Merchandise or service problems.
   c. Complaint.

5. If item is defective:

   a. Replace immediately according to store policy.
   b. Take written complaint to supervisor for proper adjustment.
      1) Take necessary steps to adjust.
      2) Get back to customer promptly.

TOOLS AND EQUIPMENT

Complaint form
Pad
Pen
Merchandise exchange forms
Cash register/terminal

DUTY B: SELLING MERCHANDISE

TASK 7: Demonstrate merchandise/describe service.

---

13. PERFORMANCE OBJECTIVE

Given potential sale to customer, describe services or demonstrate merchandise in which a customer is interested. Description or demonstration must include information on the history of product/service, product material/make, appearance, how product differs from others, its application and use, price, purchase options and warranties.

PERFORMANCE GUIDE

1. Open the discussion by giving the customer some interesting and informative remarks about the merchandise or service.

2. Try to determine what the customer is looking for.

3. Suggest to the customer a selection of merchandise or services appropriate to what they are looking for.

4. Describe the difference between the customer's possible choices.

5. Assist the customer in determining which is the best choice from possibilities.
   a. Allow customer to handle merchandise.
   b. Show appropriate brochures and other printed material.
   c. Discuss the customer's opinions concerning the differences in the products and service being considered.
   d. Determine how the customer will be using the product.
   e. Answer customer's questions honestly and forthrightly.

6. Help the customer make the final choice.
   a. Eliminate choices not desired by the customer.
   b. Help customer make final selection.
   c. Process customer order appropriately.

7. Provide written information on product and warrantees or guarantees.

TOOLS AND EQUIPMENT

Product history
Product warranty/guarantee
Company policies

DUTY B: SELLING MERCHANDISE

TASK 8: Create extra sales.

---

14. PERFORMANCE OBJECTIVE

Given a customer sale of one product, create extra sales by providing a customer with ideas for adding items to go with the product the customer has chosen and determine whether there is another sales opportunity of a different product.

PERFORMANCE GUIDE

1. Proceed as follows:
   a. Closely observe customer's choice in the initial purchase.
   b. Determine which available items will complement the item being purchased by the customer.
   c. Suggest and show the customer the complementary items before completing the sale of the initial purchase.
   d. Show accessories only as long as customer seems interested in seeing them.

2. Determine if there is a sales opportunity for a completely different product.
   a. Engage customer in a conversation about what they are doing or planning to do.
   b. Suggest merchandise ideas based on that conversation.
   c. While processing a sale, observe if customer continues to look at merchandise. If they do, there is an opportunity for sale.
      1) If they stop and handle a certain piece of merchandise.
      2) Ask if there is something else they need now or in the future.
      3) If a purchase is planned for a future time, enter on your follow-up file for future reference.

TOOLS AND EQUIPMENT

Merchandise related to original sale
Follow-up file/record

DUTY B: SELLING MERCHANDISE

TASK 9: Authorize checks.

---

15. PERFORMANCE OBJECTIVE

Given check from customer, authorize checks making sure that all information required is provided on check and check meets company standards.

PERFORMANCE GUIDE

1. Examine the check for acceptability.

    a. Identify the bank on which the check is drawn.
    b. Determine that the date is acceptable.
    c. Verify that the payee line is correctly filled in.
    d. Verify that the written amount and figure amount are in agreement.
    e. Verify that customer has shown identification and information is accurately recorded on check.
    f. Verify that check is correctly signed by customer and matches the signatures on the identification.
    g. Determine that check has no alterations.
    h. Determine that check is imprinted with customer's name and address.

2. Authorize the check according to store policy.

    a. Initial the check.
    b. Determine whether further authorization is needed.

TOOLS AND EQUIPMENT

Checks
Pen
Customer identification

DUTY B: SELLING MERCHANDISE

TASK 10: Gift wrap customers' purchases.

---

16. PERFORMANCE OBJECTIVE

Given merchandise and gift wrapping tools and materials, gift wrap customers' purchases. The finished package must be properly wrapped to prevent damage, the ends neatly closed, and the ribbon and bow securely in place.

PERFORMANCE GUIDE

1. Assemble tools and supplies at the work area.
2. Remove all price tags from the merchandise.
3. Place proper packing materials in the bottom of the box.
4. If applicable, wrap the item in tissue paper.
5. Place merchandise in gift box.
6. Add packing material to top and sides to secure item in box.
   a. Shake the box to settle packing material before closing.
   b. If needed, add more packing material.
   c. Enclose gift card.
7. Put lid on box or close.
8. Cut a piece of wrapping paper so that it will be longer than four times the length of the largest dimension of the box and extends over both ends of the box slightly more than half the box.
9. Turn the box upside down and center it over the wrapping paper.
10. Bring the paper around the box and tape.
    a. Fold extra so seam is down the center of the box.
    b. Tape.
11. Fold the ends to form a neat closure.
    a. With box upside down, fold top flap down and crease three edges.
    b. Fold back side triangle flap forward and crease edges.
    c. Fold front side triangle back.
    d. Fold bottom flap and seal.
    e. Do same with other end.
12. Turn box right side up.

DUTY B: SELLING MERCHANDISE

TASK 10: Gift wrap customers' purchases.

(Continued)

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13. Tie ribbon around box.

14. Tie bow; fasten bow and other novelty accessories to box.

TOOLS AND EQUIPMENT

Scissors
Cellophane tape
Ribbon
Gift wrap paper
Tie-ons

DUTY B: SELLING MERCHANDISE

TASK 11: Approve a charge sale.

---

17. PERFORMANCE OBJECTIVE

Provide customer with credit card sale transaction, a merchandise bank card draft, and an imprinter, authorize a charge sale according to company policies.

PERFORMANCE GUIDE

1. Check customer's credit card.

    a. Check signature.
    b. Check card number against warning list.
    c. Check expiration date.

2. Get approval code from electronic means.

3. Approve charge sale.

TOOLS AND EQUIPMENT

Credit card
Customer identification
Credit card warning list
Computer on-line credit company access
Telephone

DUTY B: SELLING MERCHANDISE

TASK 12: Process installment and revolving credit sales.

---

18. PERFORMANCE OBJECTIVE

Given merchandise customer wishes to purchase, prepare the proper paperwork prior to taking the customer to the credit office.

PERFORMANCE GUIDE

1. After the customer has chosen the item(s) to be purchased, and it has been determined that the sale is to be bought on an installment payment or revolving credit plan: complete the paperwork to process the sale. This paperwork may be a sales slip, customer order form, or other company format.

   a. If it is an installment program:

      1) Set the merchandise aside and/or mark that it is sold with the customer's name, address, and order number.
      2) Take the customer to the credit office for completion of the sale.
      3) After the credit office has completed their part, make arrangements for the goods to be picked-up or delivered.

   b. If it is to be put on a revolving credit plan:

      1) If the customer has indicated that they have an active revolving account:
         a) check with the credit office for authorization.
         b) if authorized, proceed with delivery of the item(s)
      2) If the customer does not have an active revolving account, then proceed as if it were an installment sale as listed above.

3. DO NOT QUOTE ANY PAYMENT SCHEDULE UNLESS AUTHORIZED BY THE CREDIT OFFICE. Final determination of any credit sale is ALWAYS made by the credit office. If there is a problem, contact your supervisor or store manager.

TOOLS AND EQUIPMENT

Company installment sales forms
Pen
Telephone
Cash register/terminal

DUTY B: SELLING MERCHANDISE

TASK 13: Process lay-away sales.

---

19. PERFORMANCE OBJECTIVE

Provided a customer who wishes to make a purchase on lay-away, merchandise and a lay-away sales ticket, process the lay-away sale. All required information must be legibly written on the lay-away sales ticket, and all mathematical computations must be correct.

PERFORMANCE GUIDE

1. Write legibly so others can read.

2. Complete the lay-away sales ticket. Include the following information:

   a. Customer's name, address, and phone number.
   b. Salesperson's identification number.
   c. Department number.
   d. A description of the merchandise.
   e. Price of the merchandise.
      1) taxable items
      2) nontaxable items
   f. Add sales tax and lay-away fee, if applicable.
   g. Total.
   h. Deposit made by customer.
   i. Difference between total cost of merchandise and deposit.
   j. Date the sale will be completed.

3. Have customer sign the lay-away sales ticket.

4. Collect the deposit payment from the customer.

5. Give the customer a copy of the lay-away sales ticket.

6. Attach a copy to the merchandise.

7. Route a copy to appropriate department.

8. Send merchandise to lay-away storage.

9. Enter information on follow-up file.

TOOLS AND EQUIPMENT

Lay-away sales slip
Pen
Follow-up record
Cash register/terminal
Stapler

DUTY B: SELLING MERCHANDISE

TASK 14: Process customer exchanges.

---

20. PERFORMANCE OBJECTIVE

Assist the customer in obtaining the correct product or service.

PERFORMANCE GUIDE

1. Find out what the customer is returning and why.
2. Check the customer's original sales slip to determine type of sale.
3. Determine what the customer wants in exchange.
4. Inspect returned merchandise.
5. Assist the customer in getting new merchandise.
6. Fill out proper forms for exchange.
7. Process paper work according to whether it is an even or uneven exchange.

    a. Even exchange--run through system.
    b. Uneven exchange.
        1) Where new item is more than return, process balance as a sale.
        2) If return is more than new item, write a credit slip and new sales slip.
            a) Apply difference to customer's account, credit card, or give cash as applicable.
            b) Whenever giving cash back, get supervisor's okay.

TOOLS AND EQUIPMENT

Merchandise
Exchange forms
Pen
Cash register/terminal
Telephone

DUTY B: SELLING MERCHANDISE

TASK 15: Process refunds.

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21. PERFORMANCE OBJECTIVE

Given return of merchandise and approval, process refunds. Reason for return must be recorded, proper paperwork completed, and approval obtained.

PERFORMANCE GUIDE

1. Find out what the customer is returning and why.
2. Check the customer's original sales slip to determine type of work.
3. Inspect merchandise being returned.
4. Complete paperwork.
5. Take merchandise and paper work to immediate supervisor or someone who is in position of making this type of decision.
   a. If refund is approved, write up proper paper work and follow proper procedure for refund to customer.
   b. If not approved, ask supervisor for assistance in dealing with the customer, or follow the supervisor's directions.

TOOLS AND EQUIPMENT

Pen
Merchandise return form

DUTY B: SELLING MERCHANDISE

TASK 16: Detect and report shoplifting.

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22. PERFORMANCE OBJECTIVE

Provided a shoplifting situation, detect and report the incident. Following the incident, reasons for suspecting shoplifting must be reported and store policy for handling must be followed.

PERFORMANCE GUIDE

1. Immediately greet all customers as they enter department/store.

2. Watch as customers browse or shop department.

3. Observe for characteristics such as:

   a. Customers who carry large shopping bags.
   b. Customers who exhibit nervous movement, especially shifty eyes.
   c. Customers who try to avoid being noticed.
   d. Customers who wear loose bulky coats or dresses.
   e. Customers who try to carry numerous articles of clothing into fitting or dressing rooms.

4. Follow store policy concerning the number of articles of merchandise that a customer can take into fitting or dressing room at one time.

5. Follow store policy to report observed shoplifting immediately to store manager or store security.

6. Do not make an effort to apprehend the shoplifter.

7. Explain to the store manager or store security exactly what was observed.

8. Let store manager or store security handle the situation.

TOOLS AND EQUIPMENT

Telephone

DUTY C: PERFORMING CLERICAL DUTIES

TASK 1: Close out cash register.

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23. PERFORMANCE OBJECTIVE

Given a cash register with the day's receipts, transaction forms, daily balance forms, and money bags, close out the cash register following company procedures.

PERFORMANCE GUIDE

1. Manual system:

   a. Take a register reading: follow register's standard method of closing out the register.
   b. Enter the following information on the daily balance form:
      1) Count and total each denomination of coin and currency. Before entering total, return the specified amount of coins and currency to the cash drawer to be used as the next days cash fund.
         In some firms, all cash is turned-in and the next days cash fund is received from the office each day.
      2) Total and record the amount of the checks in the cash drawer.
      3) Total these two sums.
   c. Total all paid-out and cash refund slips, subtract this figure from the total of cash and checks.
   d. Compare this figure with the audit reading from the register close-out procedure.
   e. Mark the daily balance form "cash proved," "cash over," or "cash short" as appropriate.
   f. Insert all monies, checks, over-rings, under-rings, voids, refunds, paid-outs, and the register reading and daily balance form into the money bag, close and lock (if store policy) and send or take it to the accounting department.
      Some registers have more than one cash drawer for use by separate shifts/cashiers. In some cases, each is closed-out as the shift ends, others are all done at the end of the day. If it is the latter, then each drawer should be closed-out separately. This is usually dictated by policy.
   g. If the next day's cash fund is left in the register, close cash drawer and lock the register. If all funds are turned-in, the drawer could be left open as an indication that the register has been cleared.
   h. Secure the register key as per policy.

2. Automated system:

   a. Insert daily balance form into the register imprinting slot following register instructions.
   b. Follow the instructions for closing out a manual system.

DUTY C: PERFORMING CLERICAL DUTIES

TASK 1: Close out cash register.

(Continued)

TOOLS AND EQUIPMENT

Cash register
Balance forms
Pen
Coin
Currency
Checks
Money bag
Register key

DUTY C: PERFORMING CASH REGISTER DUTIES

TASK 2: Fill out cash register summary sheet.

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24. PERFORMANCE OBJECTIVE

Provided a cash register and a summary sheet, fill out all of the necessary information on the summary sheet.

PERFORMANCE GUIDE

1. Record store number, if applicable.
2. Record date and time register is closed out.
3. Record employee number or initials.
4. Record register number.
5. Record cash register drawer number.
6. Record cash register drawer reading.
7. Record actual count in drawer.
8. Record total amount of bills.
9. Record total amount of coins.
10. Record total amount of checks.
11. Record total amount of paid-outs.
12. Calculate a subtotal.
13. Record actual count.
14. Record shortage or overage.
15. Sign the form.
16. Obtain authorized approval.

TOOLS AND EQUIPMENT

Cash register
Summary sheet
Pen

CASH REGISTER SHEET

STORE _____ DATE _____

TIME _____

EMPLOYE _____

REG. NO. _____

DRAWER _____

TOTAL DRAWER READING	$
ACTUAL COUNT	$
TOTAL CHARGES	$
CURRENCY	$
COINS	$
TOTAL CHECKS	$
TOTAL PAID–OUTS	$
SUB–TOTAL	$
TOTAL ACTUAL COUNT	$
SHORT – OVER	$

CLERK'S SIGNATURE _____

APPROVED BY: _____

P. GILMORE CDC ON [illegible] AED

DUTY C: PERFORMING CLERICAL DUTIES

TASK 3: Prepare bank deposits.

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25. PERFORMANCE OBJECTIVE

Given a bank deposit form, checks, currency, and an adding machine/calculator, prepare bank deposits. All checks, currency, and coins must be recorded and totaled without error and all identifying information must be recorded on the deposit slip without errors.

PERFORMANCE GUIDE

1. Collect all checks, coins, and currency to be deposited.
2. Separate cash and coin according to denomination.
3. Count coins and write total in the appropriate space on the deposit slip.
4. Count currency and write the total in the appropriate space on the deposit slip.
5. Verify checks to ensure that they are all payable to the store and are signed.
6. Verify endorsement of all valid checks.
7. Calculate total amount of checks.
8. List each check by number and amount in the appropriate space on the deposit slip and record the total amount of all checks on the face of the deposit.

   *Note: The total amount of all the checks may be written on the face of the deposit slip and a calculator/adding machine tape listing all checks may be attached to the deposit slip.
9. Add totals of checks, coins, and currency and write the total in the appropriate space on the deposit slip. Verify mathematics with paper tape calculator.
10. Write the following information on the face of the deposit slip:

    a. Name of the store
    b. Address
    c. Account number
    d. Date

TOOLS AND EQUIPMENT

Bank deposit forms
Currency
Adding machine/calculator
Checks
Coins

DUTY C: PERFORMING CLERICAL DUTIES

TASK 4: Process shipment memo to correct errors on merchandise received.

---

26. PERFORMANCE OBJECTIVE

Given a shipping discrepancy, a copy of the purchase order, and the receiving report, prepare a shipment memo that describes all errors that are to be corrected by the vendor.

PERFORMANCE GUIDE

1. Compare purchase order, packing slips, and receiving report.
2. Determine discrepancies.
3. Type up shipment memo describing discrepancies. Retain file copies.
4. Mail shipment memo with copies of receiving report and packing slip to vendor.

TOOLS AND EQUIPMENT

Purchase order
Packing slips
Receiving report
Shipment memo
Computer terminal
Typewriter

DUTY C: PERFORMING CLERICAL DUTIES

TASK 5: Record merchandise price changes in price book.

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27. PERFORMANCE OBJECTIVE

Given selected merchandise to be repriced, check original price with established price books and record price changes in price book and on all selected items.

PERFORMANCE GUIDE

1. Determine merchandise to be changed.
2. Record new price change on merchandise.
3. Record merchandise change in price book.
4. Record price change on markup/markdown sheets to update inventory value.
5. All merchandise on shelf must reflect current price book changes.

TOOLS AND EQUIPMENT

Price book
Price tags/stickers
Price tag printer

DUTY D: DISPLAYING MERCHANDISE

TASK 1: Set up window displays.

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28. PERFORMANCE OBJECTIVE

Given merchandise, window display space, tools and materials, set up a window display that is attractive, free of errors, and meets intended purpose.

PERFORMANCE GUIDE

1. Write a plan for the display including:

   a. The theme or purpose.
   b. Merchandise.
   c. Display accessories.
   d. Show/price cards.
   e. Tools and supplies.
   f. Depth of stock of merchandise to be displayed.

2. Draw a sketch of how the display will appear when finished.

3. Letter or order printed show/price cards.

4. Assemble tools, merchandise, props, and accessories at the work area.

5. Set up the display incorporating the following principles of display:

   a. Balance
   b. Harmony
   c. Color and texture
   d. Scale and proportion
   e. Shape
   f. Focal area
   g. Repetition
   h. Unity

6. Incorporate the following safety standards when building the display:

   a. Keep in mind that you are surrounded by glass and avoid any moves that will cause it to break.
   b. Use props to safely support all displayed merchandise.
   c. Place all electrical and lighting fixtures so that all safety requirements are met.
   d. Use only fire-resistant accessory materials in the display.

7. Avoid the use of lighting or other display techniques that will present a false impression of the merchandise.

8. Set up the display to include show and price cards that are informative, free of errors, dirt, or smudges, and that follow the purpose or theme of the display.

DUTY D: DISPLAYING MERCHANDISE

TASK 1: Set up window displays.

(Continued)

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9. To set up the display:

   a. Clean the window display area including the glass and floor area.
   b. Assemble the merchandise, tools, props, and accessories.
   c. Set up window display background.
   d. Set up the display props.
   e. Place merchandise on the display props and in the window display space.
   f. Set up accessory lighting fixtures.
   g. Set in show and price cards.
   h. Dispose of all debris.
   i. Return tools to proper place.

TOOLS AND EQUIPMENT

Merchandise
Display plan
Drawing paper
Drawing pencil
Price list
Price cards
Materials
Window cleaner
Floor cleaner
Clean cloths
Hammer
Screwdriver
Tape
Glue
Paper (colored)
Props
Knife
Scissors
Lighting fixtures

DUTY D: DISPLAYING MERCHANDISE

TASK 2: Build displays.

---

29. PERFORMANCE OBJECTIVE

Provided merchandise, display space, display tools, and equipment, build a display that meets intended objectives.

PERFORMANCE GUIDE

1. Write a plan for the display:

   a. Theme or purpose.
   b. Merchandise to be promoted.
   c. Consider store layout and flow of customer traffic.
   d. Display accessories.
   e. Signs.
   f. Tools and supplies.

2. Sketch the display.

3. Letter or order signs.

4. Assemble props, merchandise, tools and supplies.

5. Clean the display area.

6. Build the display incorporating the following principles:

   a. Balance
   b. Harmony
   c. Color and texture
   d. Proportion
   e. Shape
   f. Focal area
   g. Unity

7. Incorporate the following safety practices:

   a. Shelves, racks, and props should be adequately braced and wide enough to support displayed merchandise.
   b. Stacked displays of merchandise should be firm and neat.
   c. All electrical equipment should be placed out of customer's way.
   d. Use only fire-resistant accessory materials.
   e. Do not place display in an area that will block exits or entrances.
   f. Avoid sharp edges or corners in the display.

DUTY D: DISPLAYING MERCHANDISE

TASK 2: Build displays. (Continued)

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8. Set up a display which:

   a. Avoids false impression of the merchandise.
   b. Has only fresh and clean merchandise, props, and accessories.
   c. Has a theme or purpose.
   d. Includes signs that are free of errors, are clean, and identify the merchandise and its price.
   e. Has merchandise that is easy to reach.
   f. All fingerprints are removed from props, merchandise, and glass.

9. Check the display and make any adjustments needed.

10. Dispose of all debris.

11. Return tools and materials to storage area.

TOOLS AND EQUIPMENT

Merchandise
Display plan
Drawing paper
Drawing pencil
Price list
Price cards
Materials
Window cleaner
Floor cleaner
Clean cloths
Hammer
Screwdriver
Tape
Glue
Paper (colored)
Props
Knife
Scissors
Lighting fixtures

DUTY D: DISPLAYING MERCHANDISE

TASK 3: Perform display housekeeping.

---

30. PERFORMANCE OBJECTIVE

Provided displays, cleaning equipment, tools and materials, tidy up the displays. When finished all displays must be full; glass surfaces must be clean and polished; merchandise must be replenished, resized, restacked, and fronted. All rules of safety must be followed.

PERFORMANCE GUIDE

1. Assemble cleaning tools and equipment.

2. Inspect displays and complete the steps necessary to tidy them up:

   a. Be sure cleaning process does not damage merchandise and/or display.
   b. Dust
   c. Clean glass

3. Check merchandise:

   a. Merchandise necessary to fill shelves
   b. Restack merchandise
   c. Put merchandise back in order
   d. Front merchandise

4. Follow safety rules when cleaning:

   a. Avoid bumping display glass with body and tools.
   b. Read and follow precautions printed on labels of cleaning agents.
   c. Keep cleaning equipment and materials away from customer traffic areas.
   d. Immediately wipe up spills of cleaning liquids.

TOOLS AND EQUIPMENT

Vacuum cleaner
Dust rags
Feather duster
Glass cleaner
Rags for cleaning glass
Squeegee

DUTY D: DISPLAYING MERCHANDISE

TASK 4: Design point-of-purchase signs.

---

31. PERFORMANCE OBJECTIVE

Provided merchandise and a point-of-purchase sign request form, design a sign for the merchandise. The plan for the sign should include information that will benefit customers and a message that is brief, factual, and will attract the customer's attention.

PERFORMANCE GUIDE

1. Obtain the merchandise that will be signed.

2. Analyze the merchandise. Determine what customer benefits it offers:

   - Pleasure
   - Comfort
   - Protection
   - Time or labor savings
   - Operating features
   - Money savings
   - Appearance improvement
   - Pride of ownership
   - Security

3. Write benefits on sign request form.

4. Write the name of the product.

5. Write a list of the selling features of the product which may include:

   a. Materials of which it is made.
   b. How is it made.
   c. How it is superior.
   d. How can it be used.
   e. Its care features.
   f. Its new uses.
   g. Available sizes.
   h. Brand name.

6. Write the price of the product.

7. Give the point-of-purchase sign request form to the print shop.

TOOLS AND EQUIPMENT

Sign request form
Pen

DUTY D: DISPLAYING MERCHANDISE

TASK 5: Dismantle displays.

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32. PERFORMANCE OBJECTIVE

Provided tools, cleaning equipment, and an assembled display, dismantle the display. The display must be dismantled safely without damage to merchandise, props, or accessories; all merchandise must be returned to the appropriate department; all display props must be returned to storage; and display area must be left neat and clean.

PERFORMANCE GUIDE

1. Assemble tools and cleaning materials.

2. Adhere to following safety rules:

   a. Avoid bumping glass of window display area.
   b. Avoid placing removed props and merchandise in aisles or where entrances/exits will be blocked.
   c. Handle all tools safely.
   d. Obtain help when removing heavy objects.

3. Dismantle display:

   a. Remove signs/show cards.
   b. Remove accessory lighting fixtures.
   c. Remove merchandise with care.
   d. Remove props.
   e. Remove backdrop.

4. Return merchandise to department.

5. Return props, display materials, show cards and signs to storage.

6. Perform housekeeping activities:

   a. Clean windows.
   b. Vacuum floor.
   c. Dust props/fixtures.
   d. Throw out all trash.

TOOLS AND EQUIPMENT

Vacuum cleaner
Dust rags
Feather duster
Glass cleaner
Rags for cleaning glass
Squeegee
Hammer
Screwdriver

DUTY E: PERFORMING RECEIVING FUNCTIONS

TASK 1: Receive incoming merchandise.

---

33. PERFORMANCE OBJECTIVE

Given a freight bill and/or packing slip or purchase order, receive incoming merchandise. Discrepancies and damages, if any, are recorded on the freight bill or bill of lading and signed by the driver.

PERFORMANCE GUIDE

1. Allow only authorized delivery persons inside the firm's premises, as outlined by company policy.

    a. Ask for identification and bill-of-lading.
    b. Receive bill-of-lading from delivery person.
    c. Inspect every package for signs of outside damage.
    d. Have delivery person--or do it yourself--indicate on the bill-of-lading any package damage before signing for the shipment.
    e. Count the number of boxes/packages for agreement with the count on the bill-of-lading.
    f. Sign for the shipment only after "dande" has been completed.
    g. Arrange boxes/packages in a neat form and attach bill-of-lading (or a copy) in a prominent place.
        1) Deliver shipment to stock room/warehouse if that is your assigned task.
        2) Notify stock room/warehouse of shipments arrival.
        3) Notify parties in stock room/warehouse of any outside damage.

TOOLS AND EQUIPMENT

Bill-of-lading
Freight bill
Packing slip
Purchase order
Telephone
Hand-cart

DUTY E: PERFORMING RECEIVING FUNCTIONS

TASK 2: Unpack a shipment.

---

34. PERFORMANCE OBJECTIVE

Given an incoming shipment, unpack shipments, check contents for proper count, note inside damage and arrange items in a logical order, usually determined by the stock room/warehouse supervisor/policy:

PERFORMANCE GUIDE

1. If the shipment is from one supplier:

   a. Open each box carefully one at a time!
      1) Remove staples with staple removal tool.
      2) If nailed, pry boards to release nail heads and completely remove nails.
      3) If taped, cut tape with the proper type of knife. Do not bury the knife into the package as this may damage the contents. (In shipping, items can work their way toward a point where they could be damaged in opening.)
   b. Open box/package carefully.
   c. Remove packing slip. Note how many of each item are listed on the packing slip. There should be two counts: one on the quantity ordered, the other done by the packer. Note where the two figures do not agree.
      In some cases the packing slip may be on the outside of just one box. In others, it may be in just one box or each box will have its own packing slip. If there is just one packing list, it may indicate which item(s) are in which box.
   d. Remove each item carefully and place in a safe place (as instructed by supervisor) so the further process of unpacking can be done without damaging the items.
   e. Place packing materials in a container provided for same.
   f. Arrange goods in a logical order (as listed on the packing slip, numerically, item, etc.) as instructed by supervisor/policy.
   g. After each box has been unpacked, check carefully to make sure all contents are removed.
      1) Some items are wrapped individually and the number or name is usually written on the outside. If you are instructed to unwrap each item, be sure to attach the number to the item, if it is not on the item itself.
      2) Sometimes items are to be left wrapped/boxed until the next step. Arrange items so that the name/number is easily visible.
   h. Verify the actual and packing slip count:
      1) If the packers count and the number of items you unpacked do not agree, go back through the cartons and packing materials carefully for the missing items. If the item cannot be found, note on the packing slip that the shipment is short these item(s).

DUTY E: PERFORMING RECEIVING FUNCTIONS

TASK 2: Unpack a shipment.

(Continued)

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2) Do not destroy or throw out any boxes until all items have been checked in by stock room/warehouse personnel.

i. Note on the packing list if any item is damaged. Put a note on the box which the damaged goods came in. (If each box has its own slip, find the proper box. If there is only one packing slip for the shipment, usually the boxes are marked "1 of ___," "2 of ___," etc.)

j. After stock room/warehouse supervisor and/or claims manager has cleared the shipment, remove boxes and used packing materials to the designated area for breakdown, storage, reuse, etc.

2. If shipment is from multi-sources:

a. Treat each supplier as a separate shipment.
   1) Check the total count with the bill-of-lading and check for box damage as listed in the receiving instructions.
   2) Separate the boxes as to supplier.

b. Follow the instructions for unpacking as listed above.

TOOLS AND EQUIPMENT

Staple remover
Nail remover
Knife
Packing slip

DUTY F: PERFORMING STOCKKEEPING FUNCTIONS

TASK 1: Check in merchandise.

---

35. PERFORMANCE OBJECTIVE

Given an order of merchandise received, check in the merchandise. When finished, the number of each item received must be written on the order sheet. Damaged merchandise must be indicated.

PERFORMANCE GUIDE

1. Read the quantity of each item of merchandise received.
2. Count the number of each item of merchandise received, and write the actual count beside the count that appears on the order sheet.
3. Check the condition of the merchandise.
4. Write a description of any noticeable damage on order sheet.
5. Sign order form when completed.
6. Route the order form with the merchandise to the appropriate store employee or department.

TOOLS AND EQUIPMENT

Merchandise order form
Pen

DUTY F: PERFORMING STOCKKEEPING FUNCTIONS

TASK 2: Mark/price each item of merchandise.

---

36. PERFORMANCE OBJECTIVE

Provided merchandise, price tickets, a price-marking machine, price ticket fasteners, and a purchase order invoice with retail price, price mark each item of merchandise. Each price ticket must be marked clearly with the correct price and store information and fastened securely to the merchandise.

PERFORMANCE GUIDE

1. Select appropriate price ticket:

   a. Pin ticket.
   b. Pressure ticket.
   c. String ticket.
   d. Needle gun plastic fastener.

2. Assemble merchandise, price ticket, fasteners and price information sheets at the work area close to the price-marking machine. (If merchandise is to be priced by hand, place the items near working area.)

3. Determine what information is to be printed on price ticket such as the following:

   a. Retail price
   b. Cost-price code
   c. Season or date code
   d. Style number
   e. Vendor's number
   f. Size
   g. Color
   h. Fiber content
   i. Department code

4. Count the number of items of merchandise to be price marked.

5. Set up price-marking machine to print required information.

6. Produce price tickets based on merchandise count.

7. Attach printed price tickets to merchandise as per store policy.

8. If hand pricing merchandise, print correct price and required information on the price ticket clearly. Attach the price ticket to the merchandise as per store policy.

9. After price marking all items of merchandise, count them and compare the count to the number that appears on the purchase order or invoice.

10. Return the invoice or copy of purchase order to the appropriate place.

TOOLS AND EQUIPMENT

Price ticket
Fastener
Price marking machine
Pen

DUTY F: PERFORMING STOCKKEEPING FUNCTIONS

TASK 3: Stock merchandise.

---

37. PERFORMANCE OBJECTIVE

Provided merchandise, racks/shelves, and stocking equipment, stock all of the items on the racks/shelves.

PERFORMANCE GUIDE

1. Safely transport merchandise to proper location.
2. Make sure all prices match.
3. Check shelf allocation.
4. Rotate stock.
5. Clean shelves and merchandise.
6. Stock number of items as indicated by shelf allocation.
7. Avoid blocking aisle with equipment and merchandise.
8. Turn all labels upright facing customer.
9. Pull shelved merchandise to front.
10. Tear down empty cases.
11. Fasten all loose labels with cellophane tape.
12. Remove all damaged items from shelf.
13. Return salvage, stock-transporting equipment, damaged merchandise, and price marking equipment to stock room/storage area.

TOOLS AND EQUIPMENT

Merchandise
Racks
Shelves

DUTY G: PERFORMING MERCHANDISING MAINTENANCE ACTIVITIES

TASK 1: Count floor merchandise.

---

39. PERFORMANCE OBJECTIVE

Given forms count floor merchandise to determine amount of merchandise available for sale in the sales area.

PERFORMANCE GUIDE

1. Count at appropriate time (before opening or after closing), etc.
2. Count merchandise.
3. Complete appropriate forms and forward.

TOOLS AND EQUIPMENT

Inventory forms
Pen

DUTY G: PERFORMING MERCHANDISING MAINTENANCE

TASK 2: Order replacement merchandise.

---

40. PERFORMANCE OBJECTIVE

Given order book and stock quantity order replacement merchandise maintaining appropriate quantities of merchandise for customer sales.

PERFORMANCE GUIDE

1. If using an order book, know each item in the order book as well as the other information.
2. Check every item in the order book against the stock on the sales floor.
3. Order the quantity necessary to bring the stock up to required levels.
4. Complete orders on time.
5. Notifying management of any order problems early enough so that they can be corrected prior to the ordering deadline to ensure a good order.

TOOLS AND EQUIPMENT

Order book
Pen
Computer terminal

DUTY G: PERFORMING MERCHANDISE/MAINTENANCE ACTIVITIES

TASK 3: Change prices on merchandise.

---

41. PERFORMANCE OBJECTIVE

Provided price-marking tools and supplies, a price change list and merchandise, change the prices on the merchandise. When completed, each item of merchandise on the price change list must be correctly and legibly price marked.

PERFORMANCE GUIDE

1. Assemble price marking tools and supplies.
2. If mark-down is indicated by price change list, slash through the original price with a ball point pen and write the indicated new price on ticket. Record the amount of the mark-down.
3. If mark-up is indicated by price list, count the number of items and request new price tags with indicated new prices printed. Record the amount of the mark-up.
4. Remove old price tags, if needed, from merchandise.
5. Attach new price tags if applicable.

TOOLS AND EQUIPMENT

Price change list
Price tickets
Price-marking machine
Scissors

DUTY H: COMMUNICATING INFORMATION

TASK 1: Communicate verbally.

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42. PERFORMANCE OBJECTIVE

Communicate information verbally, accurately to others.

PERFORMANCE GUIDE

1. Adjust voice control to situation.
2. Use grammar appropriate to situation.
3. Speak clearly.
4. Interact verbally in a group.

TOOLS AND EQUIPMENT

None required.

DUTY H: COMMUNICATING INFORMATION

TASK 2: Communicate by telephone.

---

43. PERFORMANCE OBJECTIVE

Given a telephone, paper, pencil, and resource materials, communicate by telephone demonstrating correct business telephone etiquette and providing information according to company/organization/guidelines.

PERFORMANCE GUIDE

1. Identify business, department, and self.
2. Answer the incoming call promptly and courteously, pay particular attention to placing callers on hold.
3. Answer in a natural voice, using normal conversational level of speaking.
4. Speak slowly and clearly.
5. Listen to what the caller has to say.
6. Write information that needs to be kept accurately (i.e., orders of merchandise).
7. Courteously end the call when caller is finished.

TOOLS AND EQUIPMENT

Telephone
Paper
Pencil
Resource materials

DUTY H: COMMUNICATING INFORMATION

TASK 3: Introduce people.

---

44. PERFORMANCE OBJECTIVE

Given two strangers, introduce them using standard business introduction etiquette.

PERFORMANCE GUIDE

The guidelines of etiquette, and of making introductions, are to take unfamiliar situations and make them familiar to everyone involved in the particular situation.

1. Always speak clearly, slowly, and loud enough so both persons can hear what you are saying.

2. Whenever possible, it is best to use first and last names for both people. When you are introducing your peers (those about your same age), you need not precede their names with titles or Mr., Mrs., Miss, Ms.

3. When making an introduction, if either one's job, firm, or place of residence are important, this information should be included after the first person's name and either before or after the second person's name.

   a. When women are introduced to men, the woman is mentioned first. Ms./Miss/Mrs. _____, please meet Mr. _____.
   b. When either two men are being introduced to each other, or two women to each other, the one of higher position, or the eldest if their positions are of equal ranking, should be mentioned first.
   c. If one of the two is very much younger than the other, the eldest person is introduced first.
   d. When one person is being introduced to two people, the person(s) mentioned first are either older or of higher position. Make sure that you indicate what the relationship between the two people being introduced is: Mr. & Mrs. _____, both work for/in, your relationship to whomever any of the parties involved, etc.
   e. If there is a reason for making the introduction, other than just making each familiar with the other, be sure to give the reason why you wanted them to meet. You can even bring up some of the previous conversations you have been having with the party you are escorting.
   f. If the conversation between the two parties is to be short, then stay with those you have been escorting so that you can continue to introduce them to others or so they are not left stranded.
   g. If the conversation between the two parties is going to be an extended one, it is permissible to excuse yourself for a few minutes, but you should indicate that you will return and approximately when.

DUTY H: COMMUNICATING INFORMATION

TASK 3: Introduce people.

(Continued)

TOOLS AND EQUIPMENT

None required.

DUTY H: COMMUNICATING INFORMATION

TASK 4: Complete a business form.

---

45. PERFORMANCE OBJECTIVE

Given form, pen, computer terminal, complete a business form accurately and route to appropriate person.

PERFORMANCE GUIDE

1. Write legibly.
2. Complete all requested items on form.
3. Be accurate in all information.
4. Give information completely but as concisely as possible.
5. Complete in a timely fashion.
6. Route form appropriately.

TOOLS AND EQUIPMENT

Business forms
Pen
Computer terminal

DUTY H: COMMUNICATING INFORMATION

TASK 5: Follow oral instructions.

---

46. PERFORMANCE OBJECTIVE

Given a new task and listening skills, follow to perform task accurately.

PERFORMANCE GUIDE

1. Listen to speaker and concentrate on what is being said.
2. Ask questions to clarify instructions.
3. Repeat instructions to speaker to ensure understanding of task.
4. If necessary, write instructions as memory aid.
5. Follow up after completion of task to let speaker know that task has been completed.

TOOLS AND EQUIPMENT

None required.

DUTY H: COMMUNICATING INFORMATION

TASK 6: Keep informed of promotions, ongoing policies and procedures.

---

47. PERFORMANCE OBJECTIVE

Given policies and procedures, keep informed of all promotions, policies, methods, and office procedures needed to carry out expected performance on the job.

PERFORMANCE GUIDE

1. Read bulletin policies and memos.
2. Attend meetings.
3. Review oral instructions.
4. Apply information to one's job performance.

TOOLS AND EQUIPMENT

Bulletin board
Policies and procedures

DUTY H: COMMUNICATING INFORMATION

TASK 7: Identify and keep information confidential.

---

48. PERFORMANCE OBJECTIVE

Given new information, recognize information that should be kept confidential, and keep that information protected.

PERFORMANCE GUIDE

1. Understand need for confidentiality of information for protection of the business, the employees, and the customers.
2. Safeguard customer lists, price lists, marketing strategies, and other business-related information.
3. Protect information about customers that should be confidential.
4. Maintain confidentiality of personnel matters.
5. Avoid spreading rumors.
6. Avoid casual conversation about confidential information.

TOOLS AND EQUIPMENT

None required.

DUTY H: COMMUNICATING INFORMATION

TASK 8: Use communication skills to bring about improvement in the work situation.

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49. PERFORMANCE OBJECTIVE

Given a situation in which you have a suggestion for improvement, use communication skills that inform effectively.

PERFORMANCE GUIDE

1. Once you feel that you have a suggestion for improving some procedure or product, start to make your notes as to:

   a. The problem.
   b. How you came to feel that it needs to be/could be improved.
   c. What steps you feel should be taken to improve the situation.

2. Start to organize your ideas into the above categories.

3. In order to present your ideas properly, the following written information should be outlined and presented to your immediate supervisor:

   a. Make at least two extra copies for your supervisor.
   b. Make a copy for yourself and date it as to when it was presented and list to whom it was presented.
      1) Who is offered it, your position and how long you have been in the position or with the firm.
      2) What is the subject of the communication?
      3) How and why did the idea originate?
      4) a) Why do you see a need for such a change?
         b) How do you think your supervisor will see it?
         c) How do you think others in the organization will see it?
      5) Why is it different from what is currently being done?
      6) When do you think it should be started?
      7) How often will this be used by you? By others?
      8) Will it take invclvement by others to get it started and to keep it going?
      9) What and how will it go with what you, your department, the firm, and the firm's customers:
         a) are doing?
         b) planning to do?
         c) might possibly do?
      10) How much will it cost to do and how will it fit into you:
         a) department?
         b) firms?
         c) customers?

DUTY H: COMMUNICATING INFORMATION

TASK 8: Use communication skills to bring about improvement in the work situation.

(Continued)

TOOLS AND EQUIPMENT

Paper
Computer terminal
Pen
Copy machine
Typewriter

DUTY H: COMMUNICATING INFORMATION

TASK 9: Distribute information through established channels.

---

50. PERFORMANCE OBJECTIVE

Using established communication procedures, distribute information effectively.

PERFORMANCE GUIDE

1. Most companies have either a communication policy or established communications guidelines for both written and verbal communication between the employee and:

   a. His/her superior(s)
   b. His/her coworkers
   c. His/her subordinates (where appropriate)

2. Carefully review your company's communications guidelines.

   a. Ask questions of your supervisor if there is any part of the guideline you do not understand.
   b. Sometimes learning why a certain rule is in effect will help you implement that rule more easily.

3. When you have a need to create written communication, be sure company guidelines on confidentiality are followed.

   a. Do not discuss confidential matters with anyone not directly effected.

4. When you receive written communication be sure to:

   a. Carefully read the communication.
   b. Make notes, if appropriate, to be sure information communicated is properly used in the future.
   c. Follow routing instructions if the communication is to be passed on.

TOOLS AND EQUIPMENT

Company policies
Copy machine
Paper
Pen
Routing slips

DUTY I: PERFORMING SALES PROMOTION ACTIVITIES

TASK 1: Plan promotional program.

---

51. PERFORMANCE OBJECTIVE

Given a list of the promotional goals for the business, a list of promotional activities, and their cost, plan a promotional program that considers advertising, display, pricing, and public relations.

PERFORMANCE GUIDE

1. Analyze the market

2. Establish the objectives of the program.

3. Determine methods to use in promotion

   a. Advertising
   b. Pricing
   c. Public relations
   d. Display
   e. Other

4. Prepare the program budget.

5. Plan a promotional activities calendar including:

   a. Regular merchandise promotions.
   b. Holiday/season-related promotions.
   c. Community/civic activities.
   d. New or specially priced merchandise.

6. Write the promotional activities calendar:

   a. Date of promotional activity.
   b. Type of activity.
   c. Length of activity.

7. Coordinate promotion of the program with other departments.

TOOLS AND EQUIPMENT

Market information
Promotional goals
Calendar
Pen
Computer terminal

DUTY I: PERFORMING SALES PROMOTION ACTIVITIES

TASK 2: Develop advertising/public relations plan.

---

52. PERFORMANCE OBJECTIVE

Develop advertising/public relations plan. Using an advertising budget, media information, and product (line), develop advertising/public relations plan that creates consumer demand.

PERFORMANCE GUIDE

1. Develop budget for sales campaign.
2. Select media(s) to be used.
3. Identify concept to be the focus of campaign.
4. Adapt product information, consumer demand to the concept.
5. Determine product list.

TOOLS AND EQUIPMENT

Budget
Media list
Product line

DUTY I: PERFORMING SALES PROMOTION ACTIVITIES

TASK 3: Plan displays and display time schedules.

---

53. PERFORMANCE OBJECTIVE

Given a promotional activities calendar and budget, plan displays and display time schedules that meets special and regular promotional events.

PERFORMANCE GUIDE

1. Write the display plan to include:

   a. Merchandise
   b. Theme
   c. Location
   d. Size/type
   e. Necessary materials for construction
   f. Budget

2. Write a display planning calendar to include:

   a. Regular merchandise promotion events.
   b. Holiday-related merchandise promotions.
   c. Community or civic activities.
   d. New and specially priced merchandise.

3. Set a deadline date when each display must be completed.

4. Set a date for dismantling the display.

TOOLS AND EQUIPMENT

Paper
Pen
Computer terminal

DUTY I: PERFORMING SALES PROMOTION ACTIVITIES

TASK 4: Carry-out promotional program.

---

54. PERFORMANCE OBJECTIVE

Given promotional goals, budget, and activities, calendar for a promotional program, carry-out the promotional program. The promotional event(s) must not deviate (vary) from the stated promotional goals.

PERFORMANCE GUIDE

1. Analyze the promotional goals, activities calendar, and budget.

2. Write a checklist for carrying out each promotional activity:

   a. Merchandise/civic activity to be promoted
   b. Theme
   c. Location
   d. Materials and media
   e. Beginning preparations
   f. Deadlines for various stages of preparation
   g. Costs

3. Implement the stages of promotional program including:

   a. Coordination of all promotional events.
   b. Delegation of tasks to be carried out by employees.

TOOLS AND EQUIPMENT

Budget
Activities calendar
Promotional goals
Activity checklist

DUTY J: APPLYING HUMAN RELATIONS SKILLS

TASK 1: Assure cooperation between coworkers.

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55. PERFORMANCE OBJECTIVE

Apply human relations skills to assure cooperation between coworkers.

PERFORMANCE GUIDE

1. Understand tasks assigned within your work area.
2. Know where your task fits with coworkers.
3. Listen to coworkers concerns.
4. Assist coworkers whenever possible.

TOOLS AND EQUIPMENT

None required.

DUTY J: APPLYING HUMAN RELATIONS SKILLS

TASK 2: Assist customers.

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56. PERFORMANCE OBJECTIVE

Using listening and speaking skills, store policies, and store layout to assist customers to ensure customer satisfaction.

PERFORMANCE GUIDE

1. Listen carefully to customer questions.
2. Know store layout and merchandise.
3. Assist customers with product selection.

TOOLS AND EQUIPMENT

Store policies
Store layout guide

DUTY J: APPLYING HUMAN RELATIONS SKILLS

TASK 3: Participate in professional development activities.

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57. PERFORMANCE OBJECTIVE

Using private and public educational sources, participate in professional development activities that promote professional and personal growth.

PERFORMANCE GUIDE

1. Contact appropriate source; i.e.,

   a. Public Education:
      1) DECA
      2) FBLA
      3) Jr. Achievement
      4) Public speaking
      5) Dramatics
      6) Community college supplemental courses
   b. Private Sources:
      1) Business schools
      2) Audio and training tapes
      3) Professional speakers/seminars
      4) Service/civic organizations
      5) Public speaking organizations such as Toastmasters International

2. Enroll in program.

TOOLS AND EQUIPMENT

Course information
School bulletins/catalogs

DUTY K: MANAGING STORE FUNCTIONS/PHYSICAL PLANT

TASK 1: Plan physical store layout.

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58. PERFORMANCE OBJECTIVE

Given design of the building or space, plan store's physical layout to ensure most profitable store operation.

PERFORMANCE GUIDE

1. Develop a profitable store layout considering:

    a. Square footage
    b. Entrances/exits
    c. Utilities
    d. Anticipated merchandise
    e. Exterior relationships to store or area
    f. Security
    g. Fixtures

TOOLS AND EQUIPMENT

Building design
Floor plan
Graph paper
Pencil

DUTY K: MANAGING STORE FUNCTIONS/PHYSICAL PLANT

TASK 2: Plan product/space allocation.

---

59. PERFORMANCE OBJECTIVE

Given graph paper and information about merchandise to be stocked, plan product/space allocation providing sufficient space for merchandise.

PERFORMANCE GUIDE

1. Obtain sales forecast for each item in section.
2. Obtain markup percentages on each item.
3. Identify time period for which allocation is to last.
4. Write a plan for product space allocation including:
   a. Inventory required for customer demand.
   b. Frequency of ordering and delivery.
   c. Seasonality of the product's sale.
   d. Promotional activity in support of the product.
5. Draw rough sketch of section, including dimensions, movable and unmovable partitions.
6. Indicate prime accessibility areas of sections (e.g., eye-level of shelves) on rough sketch.
7. On sketch, indicate in pencil, beginning with the most profitable items, the placement of each line item in section. Sufficient space should be allocated for the merchandise. Units of each line item should be indicated in parentheses.
8. Have sketch reviewed by a second management person, noting desirable changes. Clarify changes verbally if necessary.
9. Draw final sketch in detail and scaled on graph paper. Include number of facings and distance between shelves.

TOOLS AND EQUIPMENT

Graph paper
Merchandise list
Pencil

DUTY K: PERFORMING HOUSEKEEPING AND MAINTENANCE FUNCTIONS

TASK 3: Conduct an exterior housekeeping program.

---

60. PERFORMANCE OBJECTIVE

Provided a store and personnel, conduct an exterior housekeeping program. Exterior housekeeping needs must be identified, a list of tasks developed, a schedule developed, and the program evaluated.

PERFORMANCE GUIDE

1. Identify exterior housekeeping needs.
2. Develop a list of exterior housekeeping tasks to be performed.
3. Write a task schedule.
4. Assign exterior housekeeping tasks to personnel.
5. Evaluate exterior housekeeping program.
6. Evaluate exterior appearance.
7. Revise housekeeping task list and task schedule.

TOOLS AND EQUIPMENT

Checklist
Schedule

P.O. #60 Checklist: Conduct an Exterior Housekeeping Program

ACTIVITY	RATING*	
	Acceptable	Unacceptable
1. Identified exterior housekeeping needs?		
2. Developed a list of exterior housekeeping duties to be performed on a regular basis?		
3. Wrote a task schedule?		
4. Assigned exterior housekeeping duties to personnel?		
5. Evaluated exterior housekeeping program?		
6. Evaluated exterior appearance?		
7. Revised housekeeping task list and task schedule?		

DUTY K: PERFORMING HOUSEKEEPING AND MAINTENANCE FUNCTIONS

TASK 4: Conduct an interior housekeeping program.

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61. PERFORMANCE OBJECTIVE

Provided a store and employees, plan and conduct interior housekeeping program. All housekeeping needs must be identified, tasks assigned, and program evaluated.

PERFORMANCE GUIDE

1. Identify interior housekeeping needs.
2. Develop a list of interior housekeeping tasks and standards.
3. Write a task schedule for daily routine housekeeping activities.
4. Write a schedule for weekly or monthly housekeeping tasks.
5. Assign housekeeping tasks to employees.
6. Evaluate housekeeping program.
7. Revise task schedule.

TOOLS AND EQUIPMENT

Schedule
Paper
Pencil
Checklist

P.O. #61 Checklist: Conduct an Interior Housekeeping Program

ACTIVITY	RATING*	
	Acceptable	Unacceptable
1. Identified interior housekeeping needs?		
2. Developed a list of interior housekeeping tasks and standards?		
3. Wrote a task schedule for daily routine housekeeping activities?		
4. Wrote a schedule for weekly or monthly housekeeping activities?		
5. Assigned housekeeping activities to employees?		
6. Evaluated housekeeping program?		
7. Evaluated interior appearance?		
8. Revised interior housekeeping task list and task schedule?		

DUTY K: MANAGING STORE FUNCTIONS/PHYSICAL PLANT

TASK 5: Arrange for building repairs.

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62. PERFORMANCE OBJECTIVE

Provided a building and a directory of local contractors, arrange for building repairs. Repairs must be identified, bids collected, and repairs scheduled.

PERFORMANCE GUIDE

1. Observe for needed repairs.
2. Obtain bids from contractors.
3. Review bids.
4. Select contractor.
5. Notify contractor.
6. Establish date and time for repairs.

TOOLS AND EQUIPMENT

Bids
List of contractors
Telephone
Paper
Pen
Computer terminal

P.O. #62 Checklist: Arrange for Building Repairs

ACTIVITY	RATING*	
	Acceptable	Unacceptable
1. Observed for needed repairs?		
2. Obtained bids?		
3. Reviewed bids?		
4. Selected contractor?		
5. Notified contractor?		
6. Established date and time for repairs?		

DUTY L: MANAGING STORE FUNCTIONS/OPERATIONS

TASK 1: Monitor and control store income and expenses.

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63. PERFORMANCE OBJECTIVE

Given a budget, monitor and control store income and expenses in order to maintain a budget.

PERFORMANCE GUIDE

1. Compare on a day, week, or monthly basis budget plan to actual income and expenses.
2. Identify areas of discrepancy and determine reasons.
3. Determine corrective action.
4. Implement corrective action.

TOOLS AND EQUIPMENT

Budget
Store income
Store expenses

DUTY L: MANAGING STORE FUNCTIONS/OPERATIONS

TASK 2: Operate inventory control program.

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64. PERFORMANCE OBJECTIVE

Given merchandise mix and quantity standards and inventory control form, operate inventory control program. Inventory control program must provide current control of stock by allowing comparison of merchandise received with movement of stock.

PERFORMANCE GUIDE

1. Plan merchandise mix and quantity standards.
2. Establish the method and sequence of ordering and receiving as each relates to the total amount of merchandise.
3. Identify the amount of merchandise that must be on hand to provide for customer demand.
4. Record consumption data on inventory control forms.
5. Maintain inventory control based on data recorded on inventory control forms.

TOOLS AND EQUIPMENT

Merchandise mix
Company policies
Inventory control forms

DUTY L: MANAGING STORE FUNCTIONS/OPERATIONS

TASK 3: Take inventory.

---

65. PERFORMANCE OBJECTIVE

Given inventory documents and writing or marking tools, take physical inventory of merchandise accurately.

PERFORMANCE GUIDE

1. Count merchandise.
2. Record merchandise count on inventory document.
3. Record date and initial on inventory documents.

TOOLS AND EQUIPMENT

Inventory documents
Pencil

DUTY L: MANAGING STORE FUNCTIONS/OPERATIONS

TASK 4: Observe safety precautions.

---

66. PERFORMANCE OBJECTIVE

Using store policies and procedures to prevent accidents, observe safety precautions so work place remains safe for employees and customers.

PERFORMANCE GUIDE

1. Know company safety policy and program through appropriate training.
2. Know where safety and first aid equipment is stored.
3. Know how to properly use safety and first aid equipment.

TOOLS AND EQUIPMENT

Company policies
First aid equipment

DUTY L: MANAGING STORE FUNCTIONS/OPERATIONS

TASK 5: Handle shoplifting incidents.

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67. PERFORMANCE OBJECTIVE

Provided a shoplifting situation, apply established company policy to deal with the offender and the affected employee/department, properly documenting the incident.

PERFORMANCE GUIDE

1. When an employee reports shoplifting:

   a. Be sure store security has been notified, if the store has a security department.
   b. Be sure the suspected shoplifter has been detained.
   c. Listen carefully to the employee's explanation of the situation.
   d. Be sure the suspect has an equal opportunity to explain his/her side of the story.

2. If it appears that shoplifting has occurred, carefully follow company policy when determining how to handle the offender.

   a. Company policy may allow for a reprimand of the offender if the shoplifted item is of low value and has been returned.
   b. When company policy calls for pressing criminal charges for shoplifting, contact the appropriate law enforcement agency and hold the suspect for their arrival.

3. Review the incident with employees to be sure the store makes necessary changes to protect against future problems.

4. Properly document the incident, according to company policy.

TOOLS AND EQUIPMENT

Telephone
Company policies
Report forms
Pen

DUTY L: MANAGING STORE FUNCTIONS/OPERATIONS

TASK 6: Make comparison shopping trips.

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68. PERFORMANCE OBJECTIVE

Given a list of merchandise and customer services, make a comparison shopping trip recording information on products and services.

PERFORMANCE GUIDE

1. Identify items of merchandise or customer services which need to be compared.

2. Record the following of compared merchandise:

   a. Price
   b. Brand
   c. Size/weight

3. Document similarities and differences in customer services offered.

TOOLS AND EQUIPMENT

Merchandise list
Customer service list
Pencil

DUTY L: MANAGING STORE FUNCTIONS/OPERATIONS

TASK 7: Ensure established company policies and procedures are used correctly.

---

69. PERFORMANCE OBJECTIVE

Given company policies and procedures, ensure policies and procedures are followed correctly at all times and copies of manuals are kept up to date with all changes.

PERFORMANCE GUIDE

1. Familiarize yourself with current company policies and procedures.

   a. Review quarterly all policies and procedures for current application and appropriateness.
   b. Suggest ideas for updating policies and procedures that should be changed to meet current company needs.

2. Review all company policies and procedures with immediate staff and others in supervisory positions.

   a. Discuss current policies and procedures for application and appropriateness.
   b. Review company policies and procedures, at least annually, with immediate staff for conformity.
   c. Instruct supervisors to review policies and procedures with their staffs for conformity.

3. Make sure that all current company policies and procedures are explained to all new employees.

4. Communicate to immediate staff and with supervisors all changes in policies and procedures.

   a. Explain reason for the changes.
   b. Explain the changes.
   c. Explain how the changes will affect each employee and the choices for implementing the change.
   d. Determine how the changes will be communicated throughout the company using 4a., b., and c.
   e. Discuss with immediate staff and supervisors the effects of the changes. Work with staff and supervisors on ironing out problems caused by the changes.
   f. Suggest changes if the problems caused are worse than the problems they were meant to solve.

5. Make sure that all copies of the company's policies and procedures are kept up-to-date with all changes.

TOOLS AND EQUIPMENT

Company policies and procedures

DUTY L: MANAGING STORE FUNCTIONS/OPERATIONS

TASK 8: Audit cash register/petty cash and prove cash drawer.

---

70. PERFORMANCE OBJECTIVE

Using beginning cash amount, ending cash count, and paid-outs, audit cash register/petty cash totals to prove cash drawer.

PERFORMANCE GUIDE

1. Ensure that employees who are assigned to close out the cash register are following the correct procedures.

2. Institute procedures for your notification of any deviation from a balanced cash register closing.

   a. Assist clerical staff in finding the deviation.
   b. Change close-out procedures if the procedure is the cause of the deviation.

3. Manager from time to time should perform the cash register close-out procedures. (See C1, page 31.)

TOOLS AND EQUIPMENT

Cash register/terminal
Audit form

DUTY M: MANAGING STORE FUNCTION/PEOPLE

TASK 1: Maintain a positive working environment.

---

71. PERFORMANCE OBJECTIVE

Given employees to supervise, maintain a positive working environment. A plan is developed and implemented to motivate employees and encourage good employee morale.

PERFORMANCE GUIDE

1. Develop and implement plan for management to communicate positive attitude to employees.

2. Identify methods for management to know what is going on in employees grapevine and counteract negative attitudes.

3. Use motivation techniques to increase employee productivity (i.e., incentives, recognition, etc.)

TOOLS AND EQUIPMENT

None required.

DUTY M: MANAGING STORE FUNCTIONS/PEOPLE

TASK 2: Identify and delegate tasks to employees.

---

72. PERFORMANCE OBJECTIVE

Provided a list of prioritized tasks and qualifications of employees, delegate tasks. A written list of tasks with personnel assignment(s) must be approved by an individual supervisor.

PERFORMANCE GUIDE

1. Identify and write down tasks to be performed in order of priority.
2. Assign tasks to specific employees.
3. Give timelines for completion.
4. Make employees aware of performance criteria.
5. Offer assistance in reaching the objectives of the assignment.
6. Review results.

TOOLS AND EQUIPMENT

Task list
Personnel qualifications
Pen

DUTY M: MANAGING STORE FUNCTION/PEOPLE

TASK 3: Recognize and follow lines of authority.

---

73. PERFORMANCE OBJECTIVE

Given company organizational chart, recognize and follow lines of authority in the store or company to get necessary support or needed information to initiate and accomplish a job.

PERFORMANCE GUIDE

1. Know the store or company's philosophy regarding use of lines or levels of authority.

2. Use those lines of authority when:

   a. It is required to get support for an idea for change or a job.
   b. Additional information or expertise is needed to accomplish the job effectively.

TOOLS AND EQUIPMENT

Organizational chart

DUTY M: MANAGING STORE FUNCTIONS/PEOPLE

TASK 4: Orient new employees.

---

74. PERFORMANCE OBJECTIVE

Given a new employee, employee manuals, and orientation materials, orient the new employee. The orientation must include an overview of company policies and employees' manual, an introduction to co-workers, and a tour of the store.

PERFORMANCE GUIDE

1. Introduce the employee to the company:

   a. History
   b. Philosophy

2. Inform the employee of:

   a. His/her role in the total operation of the organization.
   b. Safety regulations.
   c. General job functions and responsibilities.
   d. Location of equipment and supplies.
   e. Necessary policies and procedures applicable for the first day.

3. Present printed manuals, guides, slide programs, etc., about the company and/or job.

4. Introduce employee to co-workers.

5. Show employee the physical layout of the facility.

6. Review company benefits.

7. Answer employee's questions.

TOOLS AND EQUIPMENT

Employee manual
Orientation guide
Slide programs

DUTY M: MANAGING STORE FUNCTION/PEOPLE

TASK 5: Train new employee.

---

75. PERFORMANCE OBJECTIVE

Given employees and resource materials, train employees on store procedure and merchandise features. Employee can demonstrate procedure/equipment.

PERFORMANCE GUIDE

1. Explain to the employee the procedures that will be performed.
2. Demonstrate to the employee what or how the procedure/or equipment works.
3. Let employee demonstrate their understanding of the procedure.
4. Evaluate their understanding.
5. Repeat if necessary.

TOOLS AND EQUIPMENT

Procedure manual
Product documentation

DUTY M: MANAGING STORE FUNCTIONS/PEOPLE

TASK 6: Evaluate employee's work.

---

76. PERFORMANCE OBJECTIVE

Given a company employee evaluation form, evaluate employee according to company standards.

PERFORMANCE GUIDE

1. Set up employee evaluation schedule and notify employees.
2. Using a company employee evaluation form, observe employee performance and evaluate employee.
3. Review employee's performance record with employer criteria.
4. Conduct individual employee conferences.
   a. Review evaluation results with the employee.
   b. Establish goals for improvement.
5. Document employee conference. Provide copy of evaluation to employee.

TOOLS AND EQUIPMENT

Employee evaluation forms

P.O. #76 Checklist: Evaluate Employees' Work

ACTIVITY	RATING*	
	Acceptable	Unacceptable
1. Set up employee schedule?		
2. Notified employee?		
3. Observed employee?		
4. Conducted individual employee conference?		
5. Documented employee conference?		
6. Evaluated employee's performance?		
7. Documented observations?		

DUTY M: MANAGING STORE FUNCTIONS/PEOPLE

TASK 7: Handle employee accidents and emergency illnesses.

---

77. PERFORMANCE OBJECTIVE

Given an employee accident or emergency illness situation, handle the incident. The incident must be documented.

PERFORMANCE GUIDE

1. Question employee about injury, if possible.
2. Direct customer traffic away from the accident scene.
3. Call for required emergency assistance.
4. Secure other means of transportation to the doctor or hospital.
5. Check employee file regarding information such as: physical condition, diseases, and allergies.
6. Notify doctor or hospital that employee will be arriving.
   a. Relate information from employee file.
   b. Nature of accident.
   c. Hazardous information sheets when appropriate.
7. Notify employee's family.
8. Question witnesses.
9. Record the incident on employee's file.
10. Follow up the employee's condition.
11. File necessary accident reports.
12. Notify insurance company.

TOOLS AND EQUIPMENT

Telephone
First aid kit
Employee files
Accident report forms

P.O. #77 Checklist: Handle Employee Accidents and Emergency Illnesses

ACTIVITY	RATING*	
	Acceptable	Unacceptable
1. Questioned victim about injury?		
2. Directed customer traffic away from the accident scene?		
3. Call for required emergency assistance?		
4. Secured other means of transportation to the doctor or hospital?		
5. Checked employee file regarding information such as: physical condition, diseases, and allergies?		
6. Notified doctor or hospital that employee would be arriving and related information from employee file?		
7. Notified employee's family?		
8. Questioned witnesses?		
9. Recorded the incident on employee's file?		
10. Followed up on employee's condition?		
11. Filed necessary accident reports?		
12. Notified insurance company?		

DUTY M: MANAGING STORE FUNCTIONS/PEOPLE

TASK 8: Conduct meeting for store personnel.

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78. PERFORMANCE OBJECTIVE

Provided employees, visual aids, and information to be communicated, conduct a store meeting. The meeting must cover all items on a predesignated agenda.

PERFORMANCE GUIDE

1. Plan store meeting.
2. Write agenda.
3. Announce meeting.
4. Distribute agenda.
5. Present information.
6. Open meeting for employee questions.
7. Answer employee questions.
8. Close the meeting.

TOOLS AND EQUIPMENT

Agenda
Visual aids

TOOLS AND EQUIPMENT

Accident report forms
Activity checklist
Agenda
Bags
Bank deposit forms
Bill of lading
Bows
Box
Budget
Building design
Bulletin board
Calculator/adding machine
Calendar
Cash register key
Cash register summary sheet
Cash register/terminal
  Nonchange calculating
  Change calculating
Cellophane tape
Check cashing procedures
Check stamp
Checklist
Checks
Coins
Colored paper
Company installment sales forms
Company policies/procedures
Computer terminal
Copy machine
Course information
Credit card draft
Credit card imprinter
Credit card warning list
Currency
Customer complaint forms
Customer identification
Customer service
Daily cash register balance forms
Display plan
Display props
Drawing paper
Drawing pencil
Dust rags
Employee evaluation forms
Employee files
Employee manual
Exchange (Canadian currency) chart
First aid kit
Floor cleaner
Floor plans
Followup record
Freight bill
Gift wrap
Glass cleaner
Glue
Graph paper
Hammer
Hand cart
Inventory forms
Knife
Layaway sales slip
Lighting fixtures
Materials
Media information
Merchandise exchange/return forms
Merchandise list
Merchandise list
Merchandise order forms
Money bag
Nail remover
On-line computer credit
  approval system
Order book
Organization chart
Orientation guide
Packaging filler
Packing slips
Pad of paper
Paper
Pen
Pencil
Price book/list
Price change list
Price marking machine
Price tag fasteners
Price tag printer
Price tags/tickets
Product documentation
Product ordering source (catalogs)
Promotional goals
Purchase order
Racks
Rags for cleaning glass
Receiving report
Ribbon
Routing slips
Sales slips
Schedule
School bulletin/catalog
Scissors

Screwdriver
Service documentation
Shelves
Shipment memo
Sign request form
Slide programs
Squeege
Staple remover
Stapler
Tape
Tax chart
Telephone
Tie-ons
Typewriter
Vacuum cleaner
Visual aids